The Town of Hilton Head Island
Regular Town Council Meeting
July 21, 2015
4:00 P.M.
BENJAMIN M. RACUSIN COUNCIL CHAMBERS
REVISED AGENDA

As a Courtesy to Others Please Turn Off/Silence All Mobile Devices During the Town Council Meeting

1) Call to Order

2) Pledge to the Flag

3) Invocation

4) FOIA Compliance – Public notification of this meeting has been published, posted and distributed in compliance with the Freedom of Information Act and the Town of Hilton Head Island requirements.

5) Proclamations and Commendations

a. Mayor's Honored Islander Awards

- John Shkor
- Luther Strayer, III
- Loretta Warden

6) Approval of Minutes

a. Town Council Meeting, June 16, 2015

7) Report of the Town Manager

a. Semi-Annual Update of the Board of Zoning Appeals - Glenn Stanford, Chairman

b. Semi-Annual Update of the Design Review Board - Scott Sodemann, Chairman

c. Presentation from First Tee

d. Island Compass App Update

e. Town Manager's Items of Interest

(1) Town News

(2) Noteworthy Events

8) Reports from Members of Council

a. General Reports from Council

b. Report of the Intergovernmental Relations Committee – Bill Harkins, Chairman

c. Report of the Community Services Committee – Kim Likins, Chairman

d. Report of the Public Planning Committee – Tom Lennox, Chairman

e. Report of the Public Facilities Committee – Lee Edwards, Chairman

f. Report of the Public Safety Committee - Marc Grant, Chairman

g. Report of the Finance and Administrative Committee - John McCann, Chairman

(1) Recommendation of the Finance and Administrative Committee to the Town Council to select Patrick Ibarra of the Mejorando Group to facilitate Town Council's annual strategic planning workshop.

(2) Recommendation of the Finance and Administrative Committee to the Town Council to authorize the Town Manager to seek request for qualifications from qualified local and regional Public Relations Firms/Entities to assist the Town with developing/implementing an effective public communication program on the following Council priorities: Arts & Culture Collaborative Strategy; Coligny Circle: Sea Pines Circle Area Plan; Heritage/Cultural/Tourism; Roads and Sewer; USCB Campus Development; and Vision and Master Plan for the Island.

h. Report of the Circle to Circle Committee - Tom Lennox, Town Council Liaison

9) Appearance by Citizens

10) Unfinished Business

None.

11) New Business

a. Consideration of a Resolution – Lowcountry Regional Transportation Authority

Consideration of a Resolution authorizing the filing of applications with the Federal Transit Administration, an operating administration of the United States Department Of Transportation, for federal transportation assistance authorized by 49 U.S.C. Chapter 53; Title 23, United States Code, or other federal statutes administered by the Federal Transit Administration; and identifying Lowcountry Regional Transportation Authority as the direct recipient to apply for and receive federal urban transportation funds for the Lowcountry Area Transportation Study Area.

b. First Reading of Proposed Ordinance 2015-03

First Reading of Proposed Ordinance 2015-03 authorizing the execution of a Sale and Purchase Agreement and the execution of one or more deeds for the sale of approximately 0.472 acres of real property along Spanish Wells Road to South Carolina Department of Transportation, pursuant to the authority of S.C. Code Ann. § 5-7-40 (Supp. 2011), and § 2-7-20, C*ode of the Town of Hilton Head Island, South Carolina,* (1983); and providing for severability and an effective date.

c. Discussion of Developing a Vision for the Island.

d. Consideration of a Resolution – Purchase of Land on Palmetto Bay Road

Consideration of a Resolution of the Town Council of the Town of Hilton Head Island, South Carolina, authorizing the execution of a sale and purchase agreement of 3.75 acres along Palmetto Bay Road on Hilton Head Island, South Carolina, from Palmetto Bay Holdings, LLC.

e. Consideration of a Resolution – Purchase of Land on Palmetto Bay Road

Consideration of a Resolution of the Town Council of the Town of Hilton Head Island, South Carolina, authorizing the execution of a sale and purchase agreement of approximately 25,000 square feet along Palmetto Bay Road on Hilton Head Island, South Carolina, from Caheti 3 – Dry, LLC.

f. Appointments to Board and Commissions

12) Executive Session

a. Land Acquisition

Discussion of negotiations incident to proposed contractual arangements and proposed sale or purchase of property:

(1) Related to a request from Adventure Cove to purchase Town-owned property;

(2) Related to parcels of property in the Palmetto Bay Road Corridor;

(3) Related to a request from SCDOT associated with the replacement of Jarvis Creek bridge; and

(4) Related to a parcel near the corner of US 278 and Wild Horse Road.

b. Consideration of Appointments to Boards and Commissions

(1) Potential Appointments to the Town's Board of Zoning Appeals.

c. Legal Matters

(1) Receipt of legal advice related to a pending, threatened, or potential claim.

d. Annual Performance Review of Town Manager

13) Adjournment

Honored Islander Award

presented to

John Shkor

In recognition and appreciation for outstanding volunteer service and personal commitment towards the betterment of our community.

Presented this 21st day of July, 2015

Mayor David Bennett

Honored Islander Award

presented to

Luther Strayer, III

In recognition and appreciation for outstanding volunteer service and personal commitment towards the betterment of our community.

Presented this 21st day of July, 2015

Mayor David Bennett

Honored Islander Award

presented to

Loretta Warden

In recognition and appreciation for outstanding volunteer service and personal commitment towards the betterment of our community.

Presented this 21st day of July, 2015

Mayor David Bennett

THE TOWN OF HILTON HEAD ISLAND
REGULAR TOWN COUNCIL MEETING

Date: Tuesday, June 16, 2015 **Time:** 4:00 P.M.

Present from Town Council: David Bennett, *Mayor*; Bill Harkins, *Mayor Pro Tem*, Lee Edwards, Marc Grant, Tom Lennox, Kim Likins, John McCann, *Council Members*

Present from Town Staff: Steve Riley, *Town Manager*; Greg DeLoach, *Assistant Town Manager*; Charles Cousins, *Director of Community Development*; Brad Tadlock, *Fire Chief*; Nancy Gasen, *Director of Human Resources*; Brian Hulbert, *Staff Attorney*; Victoria Shanahan, *Accounting Manager*; Teri Lewis, *LMO Official*; Jeff Buckalew, *Town Engineer*; Julian Walls, *Facilities Manager*; Darrin Shoemaker, *Traffic & Transportation Engineer*; Shawn Colin, *Deputy Director of Community Development*; John Valvo, *Systems Analyst*; Sally Krebs, *Sustainable Practices Coordinator*; Rene Phillips, *Website Administrator*; Erica Madhere, *Finance Administrator*; Vicki Pfannenschmidt, *Executive Assistant/Town Clerk*

Present from Media: Zach Murdock, Island Packet; Jessica Knight, WTOC-TV

1) CALL TO ORDER

Mayor Bennett called the meeting to order at 4:00 p.m.

2) PLEDGE TO THE FLAG

3) INVOCATION

4) FOIA Compliance – Public notification of this meeting has been published, posted, and mailed in compliance with the Freedom of Information Act and the Town of Hilton Head Island requirements.

5) Proclamations and Commendations

a. Juneteenth Celebration Proclamation
Joyce Wright, Executive Director of the Mitchelville Preservation Project and Lavon Stevens were present to accept the proclamation.

6) Approval of Minutes

a. Town Council Meeting, June 2, 2015

Mr. Harkins moved to approve. Mr. McCann seconded. The minutes of the June 2, 2015, regular Town Council meeting were approved by a vote of 6-0-1. Mr. Edwards abstained as he was not present at the meeting.

b. Town Council Public Hearing/Special Meeting, June 9, 2015

Mr. Harkins moved to approve. Mr. McCann seconded. The minutes of the June 9, 2015 Public Hearing/Special Meeting were approved by a vote of 7-0.

7) Report of the Town Manager

a. Bicycle Friendly Community: Gold Level Award Update

Mr. Riley announced the Town of Hilton Head Island won gold level status from the League of American Bicyclists. He added that Hilton Head Island is the only gold level bike community in the southeast and in South Carolina.

Mayor Bennett stated that obtaining gold level status, along with being the only community in the southeast and in South Carolina, is a huge accomplishment and expressed kudos to the Town. He commended the collaborative efforts of the Hilton Head Island Bicycle Advisory Committee, under the leadership of Frank Babel. He asked Mr. Babel to stand and be recognized. Mayor Bennett expressed his appreciation to the entire Committee noting his belief in the capabilities, volunteer spirit of the citizenry in our community and conveyed his appreciation for all the effort put forth in obtaining the award. He thanked the Hilton Head Island-Bluffton Chamber of Commerce for highlighting the pathway network in numerous ways. Mayor Bennett also recognized Town Staff and Council for their efforts in installing miles and miles of pathways over the past two decades and stated his appreciation for the efforts put forth in reaching this milestone.

Mayor Bennett thanked all for being present and recognized Heather Rath for her coordination of the celebration. He stated congratulatory messages from Governor Nikki Haley and Andy Clark, President of the League of American Bicyclists were delivered via video and asked that they be played.

b. Review of Economic Development Corporation 2015-16 Action Plan - Don Kirkman

Mr. Kirkman detailed previous and ongoing projects and activities of the Economic Development Corporation. He stated they are aggressively marketing Hilton Head Island. Mr. Kirkman explained they are working very closely with Dr. Salazar on data collection to aid in targeting businesses. He noted they have hosted numerous events with one being held earlier in the day entitled Encore Entrepreneurship. It was held at the Arts Center of Coastal Carolina and was well attended.

c. Town Manager's Items of Interest

Mr. Riley reported on the items of interest listed below.

(1) Town News

(2) Noteworthy Events

8) Reports from Members of Council

a. General Reports from Council

Mr. McCann asked Mayor Bennett for an update on the sewer projects. Mayor Bennett informed Council that he had met with Mr. Riley, Town staff and Pete Nardi of the Hilton Head Public Service District. Mr. Nardi laid out a comprehensive master plan and a proposed approach for providing sewer to the unserved areas of Hilton Head Island. He said he also provided rough cost estimates. He explained that Town staff is now reviewing the information received from Mr. Nardi and determining areas which would require a roadway in order to facilitate sewer service. He stated they would also be compiling cost estimates.

b. Report of the Intergovernmental Relations Committee – Bill Harkins, Chairman

Mr. Harkins stated he would present his report under New Business.

c. Report of the Community Services Committee – Kim Likins, Chairman

Mrs. Likins reported the Arts and Cultural Strategic Planning Committee met on June 15. She added that the Community Services Committee will meet on Friday, June 19 to conduct interviews open positions on the Board of Zoning Appeals.

d. Report of the Public Planning Committee – Tom Lennox, Chairman

No report.

e. Report of the Public Facilities Committee – Lee Edwards, Chairman

No report.

f. Report of the Public Safety Committee - Marc Grant, Chairman

No report.

g. Report of the Finance and Administrative Committee - John McCann, Chairman

Mr. McCann stated the Finance and Administrative Committee recommends that Town Council authorize the Town Manager to enter into a contract with Dr. John Salazar representing USCB and Dr. Robert T. Carey representing Clemson University, for services that would provide, in part, comparative economic analysis of Hilton Head Island versus other communities and other council-generated studies.

Mr. Harkins moved acceptance of the direction as set forth by Mr. McCann. Mr. McCann seconded. The motion was approved by a vote of 7-0.

Mr. McCann reported the Committee reviewed items for consideration to be included in the Capital Project Sales Tax discussion. He said they met earlier in the day which resulted in three major items to be considered for inclusion which include the arts, the bridge to Hilton Head Island and sewers. He explained the items not only benefit Hilton Head Island but also the surrounding communities. Mr. Harkins reviewed the criteria for the projects to be included in the proposed Capital Sales Tax.

Mr. McCann said the Committee also discussed the Public Communications RFP. He stated they had preliminary discussions and they will review a draft RFP at their next meeting and hope to have a recommendation to Council in July.

h. Report of the Circle to Circle Committee - Tom Lennox, Town Council Liaison

Mr. Lennox reported the community forums have been completed and three dominant themes resulted from the input which included Coligny Circle/Forest Beach area, Pope Avenue Corridor between Coligny and Sea Pines Circle and Sea Pines Circle and its four quadrants extending to Archer Road. He said the discussion evolved into a vision for each of the areas and a vision defining the character, as well as the challenges that may need to be overcome to progress. He said the input overall was very strong with a total of over 150 attending the five forums.

9) Appearance by Citizens

Mr. Skip Hoagland previously signed up to speak regarding the Hilton Head Island – Bluffton Chamber of Commerce. Mayor Bennett invited him to approach the dais. Mr. Hoagland stated that he chose to pass.

10) Unfinished Business

a. Second Reading of Proposed Ordinance 2015-14

Second Reading of Proposed Ordinance 2015-14 to amend Title 1, Title 8, Title 15 and Title 17 of the Municipal Code of the Town of Hilton Head Island, South Carolina, making general amendments to reflect new Land Management Ordinance sections and references and providing for severability and an effective date.

Mr. Harkins moved to approve. Mr. McCann seconded. The motion was approved by a vote of 7-0.

Mrs. Likins informed the Mayor she was going to recuse herself before Item 10.b. was addressed and she left the dais. The required Potential Conflict of Interest form will be attached to the approved, signed minutes.

b. Second Reading of Proposed Ordinance 2015-15

Second Reading of Proposed Ordinance 2015-15 of the Town of Hilton Head Island, South Carolina, authorizing the execution of a lease with Boys and Girls Clubs of the Lowcountry, Inc. pursuant to the authority of S.C. Code Ann. § 5-7-40, and § 2-7-20 of the *Code of the Town of Hilton Head Island, South Carolina*; and providing for severability and an effective date.

Mr. Harkins moved to approve. Mr. McCann seconded. The motion was approved by a vote of 6-0.

Mrs. Likins returned to the dais at this time.

c. Second Reading of Proposed Ordinance 2015-13

Second Reading of Proposed Ordinance 2015-13 to raise revenue and adopt a budget for the Town of Hilton Head Island, South Carolina, for the fiscal year ending June 30, 2016; to establish a property tax levy; to establish funds; to establish a policy for acquisition of rights of way and easements; and providing for severability and an effective date.

Mr. Harkins moved to approve. Mr. McCann seconded. The motion was approved by a vote of 7-0.

11) New Business

a. Consideration of a Recommendation from the Accommodations Tax Advisory Committee for the Chamber of Commerce Visitor and Convention Bureau's proposed 2015-16 "30 Percent" Budget.

Mr. Harkins moved to approve. Mr. McCann seconded. Mayor Bennett invited representatives from the Hilton Head Island – Bluffton Chamber of Commerce/Visitor and Convention Bureau to speak regarding the proposed budget.

Mr. Jay Wiendl, Chairman of the Board of Directors approached the dais. He stated that the Community is experiencing revitalization through the impact of a tremendous capital infusion. He said businesses have invested over half a billion dollars in renovations, new builds and new businesses. He expressed that while the investments did a lot for the community, it is the call to action that is the most critical step in ensuring sustainability. He added that it is the reputation, management, marketing and servicing, among several others that have pushed the VCB to records. Mr. Wiendl explained they are marketing six months to a year out and the funds are needed to proceed. He said the Island needs to be focused and the VCB drives the destination marketing better than any other he has seen in the many communities where he has worked.

Mrs. Likins requested an update on the Waymaker application. Ariana Pernice, Vice President of Marketing and Tourism, stated the application will launch by the end of June.

Mayor Bennett referenced the Vacation Planner distributed by the VCB and asked if it was paid for with ATAX funds. Ray Deal, Controller for the Hilton Head Island – Bluffton Chamber of Commerce and Visitor and Convention Bureau, confirmed that a portion of the planner is paid for by ATAX funds from the Town of Hilton Head Island, the Town of Bluffton and Beaufort County. Mayor Bennett noted that all restaurants and destinations for the area were not listed. Mr. Deal explained they utilize their member data base in compiling information for the publication and try to add others but need to improve in that area. Mayor Bennett stated that having a complete listing would benefit the tourists and the Community.

Mayor Bennett stated he reviewed reports from the Destination National Association International (DNAI). He said that when he looked at their system of accounts, they listed more detailed information regarding operating expense line items regarding salary and travel expenses. He noted they were not delineated within the marketing summary from the VCB and asked if there was a reason the costs were not detailed. Mayor Bennett added that more detail would benefit the community and be more transparent.

Mr. Deal referred to the Administration Fee within their report explaining they are the DMO for the Town of Hilton Head Island, Town of Bluffton and Beaufort County as well as PRT and unincorporated Southern Beaufort County. He stated they try to spread the cost allocations fairly across the entities. He said in the case of Hilton Head Island with $1.4 to $1.5 in total ATAX funds, the administrative cost is approximately 37 percent and consistent with what they charge to the other municipalities. He added that a 2013 DNAI report showed the average administrative fee was 50 percent for an entity the same size as the VCB. Mr. Deal stated they try to keep the fee at one-third administrative fee and two-thirds marketing. Mayor Bennett restated he felt the more detail the better and that he would like to see the breakdown.

Mayor Bennett said in one DNAI report it was stated that 70 percent of the DMO's in the United States are stand-alone entities and 20 percent were run by municipalities and less than 10 percent were combined Chamber-VCB entities. He asked for thoughts on splitting the organization into two entities. Mr. Wiendl explained he felt expenses are saved by having the two entities together. He added that from a productivity and communication standpoint, being combined results in being well-aligned.

Ms. Pernice added that the VCB's goal is to work closely with their partners and do so on an everyday basis to understand efforts and to build upon the branding of the destination and other ways partnerships can work together.

It was noted that the Hilton Head Island – Bluffton Chamber of Commerce and Visitor and Convention Bureau has a four star rating from the DNAI. Mr. Harkins emphasized the need to utilize tools provided by the DNAI Accreditation which can be used to represent to the public that tax dollars are being well spent. He volunteered to work with them on accomplishing that task. Mrs. Likins added that she knows what goes into obtaining accreditation and the VCB should be touting their status with the DNAI.

Mr. Lennox said he has seen the detail of the financial statements and he feels the combination of both entities works. He said the Town needs to better define and measure expectations. He said the Chamber/VCB staff and Board have been very helpful in working with Council to answer questions and a review of the financials. Mayor Bennett agreed with Mr. Lennox regarding setting requirements for the organization and said that when dealing with a combined organization, and given the ATAX statute, that raises the bar on the level of transparency needed. He explained he wants to make sure that the dollars that are allocated are being used in accordance with the law and it may be best to have a tax opinion. He said the Town needs to see the return on their dollars and the measurements for it. Mr. Lennox referenced their marketing report noting the information is provided.

Mr. Edwards stated that at the December workshop, Council discussed an audit requirement of the larger entities receiving ATAX funds and inquired as to the status of that discussion. Mr. Deal stated that they do have an independent audit completed. Mayor Bennett confirmed they did submit an audit but questioned whether the Town would like to develop specific criteria for the audit. Discussion ensued concerning audit requirements and specifications concerning an audit request.

A resident that identified himself as a constituent of Mrs. Likins addressed Council asking if there is an output standard on return. He stated Council needs to measure outcomes based on what they decide they need to be.

After further discussion, the motion was approved by a vote of 7-0.

Mr. McCann moved that Town Council authorize the Town Manager to enter into negotiations with the Hilton Head Island-Bluffton Chamber of Commerce for the purpose of producing a draft contract that reflects the Council's expectations with regard to the performance and standards with the Chamber's Visitors and Convention Bureau. Mr. Harkins seconded.

Mr. Edwards asked Mr. McCann to elaborate on the expectations of the contract. Mr. McCann stated that the Committee looks for the contract to reflect compliance with the ATAX regulations, use of the money that they have, criteria for evaluating how the money is being spent, and using the DNAI criteria for reporting line items. Mr. Lennox added that the contract should clearly define the scope of work. Mr. Edwards noted the audit requirement or tax opinion should be included.

The motion was approved by a vote of 7-0.

Mr. Harkins requested to add an item to the agenda under New Business regarding the recommendation from the Intergovernmental Relations Committee for a resolution identifying direct recipients for the public transportation funds. Mr. Riley explained that under the new State Law, unless there is an emergency, an item cannot be added to the agenda when it is a final decision. He suggested the item be carried over to the next meeting. All concurred.

b. Consideration of Acquisition of Property in the Palmetto Bay Road Corridor

Please see below.

12) Executive Session

Mr. Riley stated he needed an Executive Session for contractual matters related to land acquisition, including a request by AT&T Mobility to lease town-owned land; a request by Circle K to purchase town property; and a request from Mr. David Berry to purchase Town property; potential acquisition of property by Town Council in the Palmetto Bay Road Corridor; and contractual matters related to the Development Agreement for Shelter Cove Towne Centre. At 5:34 p.m. Mr. Harkins moved to go into Executive Session for the reasons stated by the Town Manager. Mr. McCann seconded. The motion was approved by a vote of 7-0.

Mayor Bennett called the meeting back to order at 6:08 p.m. stating no action was taken during Executive Session and stated there was no business to address regarding New Business Item 11.b.

13) Adjournment

Mayor Bennett adjourned the meeting at 6:08 p.m.

_____

Vicki L. Pfannenschmidt,
Executive Assistant/Town Clerk

Approved:

_____

David Bennett, Mayor

ITEMS OF INTEREST
JULY 21, 2015

Town News

The Town of Hilton Head Island has earned the Sustainable Planning Award from Audubon International. This award recognizes the completion of the second stage in the three stage Audubon International Sustainable Communities Program. The Town became the sixth community nationwide and the first in South Carolina to receive this recognition. The Town will now move forward into stage three of the Sustainable Communities Program, where progress on objectives listed in the Green Blueprint will be reported to complete stage three of the program and achieve the designation of Audubon International Certified Sustainable Community.

(Contact: Marcy Benson, Senior Grants Administrator at marcyb@hiltonheadislandsc.gov or 843-341-4689)

The Community Development Block Grant (CDBG) five year Consolidated Plan, which was approved by Town Council in April 2015, has been reviewed and after two rounds of revisions was approved by the U.S Department of Housing and Urban Development (HUD) on July 8, 2015. A congressional release of funds has been requested by the Columbia HUD field office. When the release of funds is approved, a grant agreement and an official approval letter will be sent for signatures.

(Contact: Marcy Benson, Senior Grants Administrator at marcyb@hiltonheadislandsc.gov or 843-341-4689)

The Town Building Division has received recognition from the International Codes Council as being 100% Certified. Our Building Division staff earned this designation through the Get Everyone Certified Challenge presented by ICC and Target, a partnership to promote code knowledge. This achievement recognizes the Building Division through rigorous testing of ICC certifications, ensuring staff has demonstrated competency in the requirements of the International Codes. It demonstrates expert knowledge by staff, and our confirmed commitment to public safety.

(Contact: Bob Klein, Building Official at bobk@hiltonheadislandsc.gov or 843-341-4664)

Noteworthy Events

Some of the upcoming meetings at Town Hall:

- Circle to Circle Committee – July 22, 2015, 8:30 a.m.
- Public Planning Committee – July 23, 2015, 3:00 p.m.
- Public Facilities Committee Meeting – July 27, 2015, 10:00 a.m.
- Board of Zoning Appeals – July 27, 2015, 2:30 p.m.
- Arts and Strategic Planning Committee – July 27, 2015, 4:00 p.m.
- Community Services Committee – July 28, 2015, 9:00 a.m.
- Construction Board of Adjustments and Appeals – July 28, 2015, 5:30 p.m. - Cancelled
- Design Review Board – July 28, 2015, 1:15 p.m.
- Circle to Circle Committee, July 29, 2015, 8:30 a.m.
- Finance and Administrative Committee, August 4, 2015, 2:00 p.m.- Cancelled
- Town Council – August 4, 2015, 4:00 p.m.
- Town Council Public Hearing – Proposed Addendum #1 to Amended and Restated Development Agreement with Shelter Cove Towne Center, LLC– August 4, 2015, 5:30 p.m.

(Additional meetings may be scheduled and all meetings are subject to change and/or cancellation. Please visit the Town of Hilton Head Island website at www.hiltonheadislandsc.gov for Committee meeting dates and agendas.

2015 Hilton Head Island Events

Tuesdays thru August 11, 2015 5:00 p.m. – 10:00 p.m.	HarbourFest 2015	Shelter Cove Harbour
Fridays thru – August 14, 2015 6:00 p.m.-9:00 p.m.	Sunset Celebration	Shelter Cove Community Park

TOWN OF HILTON HEAD ISLAND

Community Development Department

TO:	Town Council; Stephen G. Riley- CM-ICMA
FROM:	Jill Foster, Deputy Director
CC:	Charles Cousins, Director
DATE	June 15, 2015
SUBJECT:	Resolution Identifying the Direct Recipient for MPO Public Transportation Funds

Recommendation: Recommend approval of the enclosed Resolution which designates Lowcountry Regional Transportation Authority (LRTA) as the entity to receive Federal public transportation funds on behalf of the Metropolitan Planning Organization known as the Lowcountry Area Transportation Study (LATS).

On June 15, 2015, the Intergovernmental Relations Committee unanimously approved this resolution be sent to Town Council for adoption.

Summary: To receive Federal monies for public transportation, each participating local government in the urbanized area (Hilton Head Island, Bluffton and Beaufort County) and the LATS Policy Board must designate a public transportation entity to apply for and receive Federal monies to promote regional transportation for LATS. Local matches from each of the urbanized area governments will be requested by LRTA in order to provide service to those areas.

Background: As a result of the 2010 census, the Bureau of the Census designated the Town of Hilton Head Island, the Town of Bluffton, and portions of southern Beaufort County to be an 'Urbanized Area' because their combined population (68,998) reached over 50,000. This required the creation of a Metropolitan Planning Organization (MPO) to carry out a transportation planning process on a regional basis. The municipalities of Beaufort, Port Royal, Hardeeville, Bluffton, and Hilton Head Island, and both Jasper and Beaufort Counties have joined the new MPO. These governmental entities have approved a resolution defining MPO boundaries, identifying Policy Board membership, delegating the lead agency to the Lowcountry Council of Governments, and naming the MPO organization as the Lowcountry Area Transportation Study.

In February 2013, the Governor officially created LATS as the newest of eleven MPOs in South Carolina. In order to receive Federal funding for public transit in the LATS area, a Direct Recipient must be identified. Lowcountry Regional Transit Authority (known as Palmetto Breeze) serves our LATS area, and is qualified to be the Direct Recipient of such Federal funds.

RESOLUTION AUTHORIZING THE FILING OF APPLICATIONS WITH THE FEDERAL TRANSIT ADMINISTRATION, AN OPERATING ADMINISTRATION OF THE UNITED STATES DEPARTMENT OF TRANSPORTATION, FOR FEDERAL TRANSPORTATION ASSISTANCE AUTHORIZED BY 49 U.S.C. CHAPTER 53; TITLE 23, UNITED STATES CODE, OR OTHER FEDERAL STATUTES ADMINISTERED BY THE FEDERAL TRANSIT ADMINISTRATION; AND IDENTIFYING LOWCOUNTRY REGIONAL TRANSPORTATION AUTHORITY AS THE DIRECT RECIPIENT TO APPLY FOR AND RECEIVE FEDERAL URBAN TRANSPORTATION FUNDS FOR THE LOWCOUNTRY AREA TRANSPORTATION STUDY AREA.

WHEREAS, in March 2012, the Bureau of the Census defined a new Urbanized Area, based on the 2010 Census, when the combined population of the Town of Hilton Head Island, the Town of Bluffton, and parts of unincorporated Beaufort County reached over 50,000; and

WHEREAS, 23 CFR Section 450.310(a) requires that a Metropolitan Planning Organization (MPO) be designated for each Urbanized Area with a population of more than 50,000 individuals as determined by the Bureau of the Census; and

WHEREAS, On August 7, 2012, the Town Council of the Town of Hilton Head Island adopted a Resolution providing for the approval of geographical boundaries and policy board membership to the Metropolitan Planning Organization; and

WHEREAS, on February 11, 2013, the State of South Carolina created the Lowcountry Area Transportation Study (LATS) to be the Metropolitan Planning Organization for the Bluffton/Hilton Head Island Urbanized Area to carry out a continuing, cooperative, and comprehensive multimodal transportation planning process; and

WHEREAS, the Federal Transit Administrator has been delegated authority to award Federal financial assistance for a transportation project to MPOs; and

WHEREAS, a Direct Recipient must be so identified by the LATS Policy Board and each participating local government in the urbanized area to act as the Applicant for financial assistance in public transportation projects; and

WHEREAS, the grant or cooperative agreement for Federal financial assistance will impose certain obligations upon the Applicant, and may require the Applicant to provide the local share of the cost; and

WHEREAS, the Applicant has or will provide all annual certifications and assurances to the Federal Transit Administration required for the project;

WHEREAS, the Town will work with the other local governments and the state within the urbanized area to provide matching funds for the urban funds from the Federal Transit Administration; and

WHEREAS, on June 15, 2015, the Intergovernmental Relations Committee of the Town of Hilton Head Island unanimously approved the resolution to be sent to Town Council for adoption.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL FOR THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA, THAT:

1. The Executive Director of the Lowcountry Regional Transit Authority (LRTA) is authorized to execute and file an application for Federal assistance on behalf of LRTA for the LATS as its Direct Recipient; and

2. The Executive Director of LRTA is authorized to execute and file with its applications the annual certifications and assurances and other documents the Federal Transportation Administration requires before awarding a Federal assistance grant or cooperative agreement; and

3. The Executive Director of LRTA is authorized to execute grant and cooperative agreements with the Federal Transit Administration on behalf of the LRTA for LATS; and

4. The Town will work with the other local governments and the state within the urbanized area to provide matching funds for the urban funds from the Federal Transit Administration.

MOVED, APPROVED, AND ADOPTED THIS _____ DAY OF _____, 2015.

_____
David Bennett, Mayor

ATTEST:

By: _____
Victoria L. Pfannenschmidt, Town Clerk

APPROVED AS TO FORM:

_____
Gregory M. Alford, Town Attorney

Introduced by Council Member: _____

TOWN OF HILTON HEAD ISLAND

Public Projects and Facilities Management Department

TO: Stephen G. Riley, ICMA-CM, Town Manager
VIA: Scott Liggett, Director of Public Projects & Facilities/Chief Engineer

FROM: Jeff Buckalew, Town Engineer
CC: Mitch Thoreson, Town Attorney's Office
DATE July 13, 2015
SUBJECT: SCDOT Acquisition of Town lands for the Spanish Wells Road Bridge Replacement

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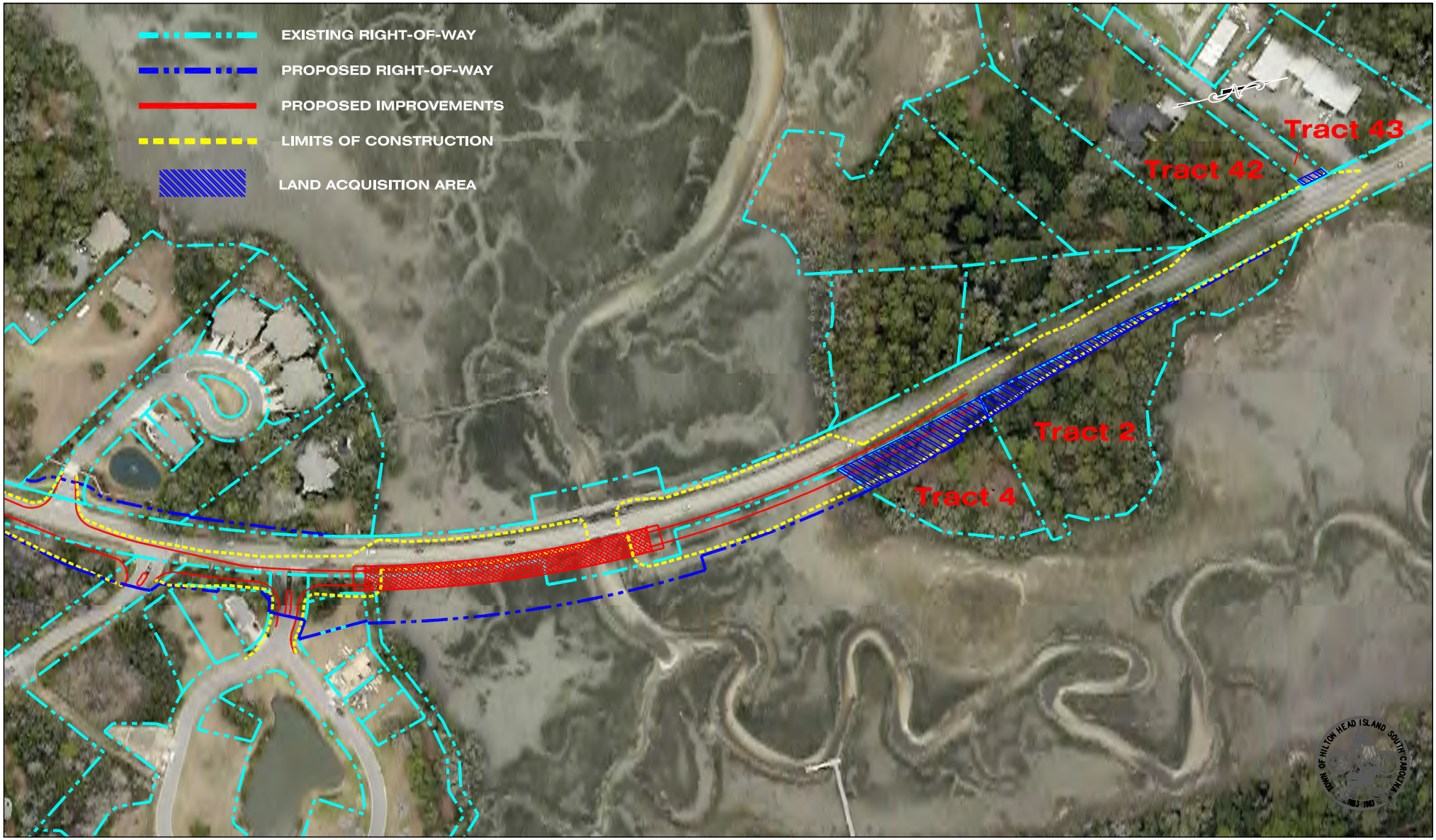
Recommendation: Staff recommends that the Town accept the SCDOT offer to acquire portions of Town owned lands to facilitate the replacement of the Spanish Wells Road Bridge over Jarvis Creek.

Summary: The SCDOT has plans to replace the existing Spanish Wells Road Bridge over Jarvis Creek. The construction plans show encroachments onto Town owned lands. The SCDOT is offering $61,975.00 for fee simple title to 0.472 acres of Town land, based on certified appraisals. The SCDOT also requests right of entry for temporary access to install erosion and sediment control measures during construction on another Town owned parcel. Staff finds the offer to be fair and reasonable and ultimately the state may condemn these lands if negotiations fail. These acquisitions will not prohibit or significantly interrupt any future plans of the Town regarding these parcels, which may include preservation or developing a passive park. Beaufort County Council has accepted a separate offer from the SCDOT regarding their joint interest in two of the properties.

Background: The new roadway alignment will allow for the existing bridge to remain in service while the new bridge is being built, thus mitigating delays and traffic impacts to the travelling public, emergency responders, as well as local businesses and residents, but it creates the need acquire Town owned lands. The acquisition offers from the SCDOT are $22,390.00 for 0.180 acres of parcel R511 007 000 075A 0000 (referred to a Tract 2 on the SCDOT documents), $35,385.00 for 0.285 acres of parcel R511 007 000 075F 0000 (referred to a Tract 4 on the SCDOT documents), and $4,200.00 for 0.007 acres of parcel R511 007 000 1048 0000 (referred to a Tract 43 on the SCDOT documents). The offer letters and appraisals are included as attachments.

In 2007, the Town acquired parcel number R511 007 000 075A 0000, which is 1.93 acres and a.k.a. the Butch Floyd parcel, jointly with Beaufort County paying half interest in the $639,000 purchase. Also in 2007, the Town acquired the 1.40 acre parcel number R511 007 000 075F 0000 a.k.a. the Earl Smith parcel, jointly with Beaufort County paying half interest in the $790,000 purchase. Parcel R511 007 000 1048 0000 is the Humane Way road right of way which is owned by the Town. The temporary rights to install sediment and erosion control measures on parcel R511 007 000 075B 0000, which is referred to as Tract 42 on the SCDOT documents, will dissolve after the construction is complete.

Attachments



TOWN OF HILTON HEAD ISLAND
1 TOWN CENTER COURT
HILTON HEAD ISLAND, SC 29928
843.341.6000

Attachment A -
SPANISH WELLS ROAD BRIDGE REPLACEMENT SCDOT Land Acquisition

Existing Parcel Boundary Lines

SCDOT Land Acquisition Area
New SCDOT Right-of-Way

Attachment B:
Spanish Wells Road Bridge Replacement
SCDOT Land Acquisition

N

South Carolina
Department of Transportation

Town of Hilton Head Island and
Beaufort County
Post Office Box 1228
Beaufort, SC 29901

File-7.039102 Road/Route- S-79 (Spanish Wells Road) - Beaufort County
PIN- 39102 RD01 Project- BR07(009) Tract- 2

Dear Landowner:

Reference is made to the above captioned project, under which the South Carolina Department of Transportation proposes to acquire a portion of your property for this improvement as has been discussed with you previously. The Department must pay just compensation for the property which is based on an appraisal made by a qualified real estate appraiser using comparable sales in the area.

The appraisal, which is available to the landowner upon request, has been made, reviewed and approved, and I am now authorized to make you the following offer:

$22,390.00 For fee simple title to 0.18 acre (7,857 SF) of land and all improvements thereon, of any.

Please give this offer your prompt attention and let me know your decision as soon as possible. Retain this information to report your payment according to IRS rules in Publication 544.

If I can be of any further assistance, do not hesitate to contact me.

Sincerely,

Brian Whiting
Right of Way Agent
702 Hodge Road
Summerville, SC 29483

10-7-14
Date Offer Made

South Carolina
Department of Transportation

Town of Hilton Head Island and
Beaufort County as Tenancy in Common
1 Town Center Court
Beaufort, SC 29928

File-7.039102 Road/Route- S-79 (Spanish Wells Road) - Beaufort County
PIN- 39102 RD01 Project- BR07(009) Tract- 4

Dear Landowner:

Reference is made to the above captioned project, under which the South Carolina Department of Transportation proposes to acquire a portion of your property for this improvement as has been discussed with you previously. The Department must pay just compensation for the property which is based on an appraisal made by a qualified real estate appraiser using comparable sales in the area.

The appraisal, which is available to the landowner upon request, has been made, reviewed and approved, and I am now authorized to make you the following offer:

$35,385.00 For fee simple title to 0.285 acre (12,416 SF) of land and all improvements thereon, of any.

Please give this offer your prompt attention and let me know your decision as soon as possible. Retain this information to report your payment according to IRS rules in Publication 544.

If I can be of any further assistance, do not hesitate to contact me.

Sincerely,

Brian Whiting
Right of Way Agent
702 Hodge Road
Summerville, SC 29483

10-7-14
Date Offer Made

SCDOT
South Carolina
Department of Transportation

12/1/14

Town of Hilton Head Island, South Carolina
1 Town Center Court
Hilton Head Island, South Carolina 29928

File 7.039102–S-79 (Spanish Wells Road) – Beaufort County
PIN 39102 RD01-Project BR07(009) –Tract 43

Dear Landowner:

The South Carolina Department of Transportation proposes to acquire a portion of your property for the improvement of the above referenced project that has been previously discussed with you. The Department must pay just compensation for the property which it acquires for public purposes. The Department previously made you an offer based on a cost estimate in the amount of $ 4,200.00 on 5/19/14. Since that offer amount was not satisfactory to you, the Department requested an appraisal of your property to be made by a qualified real estate appraiser using comparable sales in the area.

The appraisal is now complete and is available to you upon request. It has been reviewed and approved, and I am now authorized to make you the following appraised offer:

$1,305.00	For fee simple title to 305 square feet (0.007 acre) of land and all improvements thereon, if any.

However, since the Department offered to settle with you based on the Cost Estimate amount shown above, we are still willing to negotiate based on that amount. Should negotiations fail and an amicable settlement not be reached, eminent domain proceedings will be commenced. If eminent domain is required, the amount based on the appraisal will be deposited with the Clerk of Court's office or made available to you as a 100% drawdown.

If I can be of any further assistance, do not hesitate to contact me.

Sincerely,

Brian Whiting

Brian Whiting
Right of Way Agent
702 Hodge Road
Summerville, South Carolina 29483
Telephone: (843) 224-5253 (HO)
(803) 260-4218 (C)

12-8-14
Date Offer Made

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUMMARY APPRAISAL REPORT

(1) Tract Location: East side Spanish Wells Rd., Hilton Head Island, S.C.
Property Owner: Beaufort County & Town of Hilton Head Island
Address: 1 Town Center Court, Hilton Head Island, S.C. 29928

Areal View of Subject Property

PREPARED FOR:
South Carolina Department of Transportation

(2) Prior to inspection the owner was contacted by telephone and invited to be present during inspection of this property. The tract was inspected on August 5, 2014 and I was accompanied by , nobody.
Required by Sec. 102 (c) 1of Uniform Act.
Explain: (Why not accompanied, relation of representative, items discussed, etc.)

I contacted Mr. Rob McFee with Beaufort County and Mr. Scott Liggett with the Town of Hilton Head Island by email prior to the inspection. I also left a telephone message for Mr. McFee. The emails and telephone call were not returned, and I inspected the subject property alone on August 5, 2014. I spoke with Mr. McFee via telephone after the inspection, and he did not feel it was necessary to meet me on-site.

A couple of employees with the Town of Hilton Head Island also telephoned after the inspection, and we discussed the acquisition. It was explained that I would be on the island again August 12, 2014 and to contact me if a representative for the Town of Hilton Head wished to meet on-site. I did not hear back from the Town.

AUG 18 2014

SCDOT
SOUTHERN R/W OFFICE
Right of Way Section

SCDOT

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

PREPARED BY:

(3) Stuart M. Saunders, MAI, CCIM
S.C. State Certified General R/E Appraiser #: CG 1405

Firm Name: Saunders & Associates,

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

APPRAISAL SUMMARY

(4) Property Owner: Beaufort County & Town of Hilton Head Island
Tract Location: East side Spanish Wells Rd., Hilton Head Island, S.C.
Date of Appraisal: 08/14/14 Date of Value: 08/5/14

(5)

DESCRIPTION	BEFORE	AFTER
Present Use:	Undeveloped (Describe if "Other")	Same (Describe if "Other")
Number of Buildings:	0	0
Primary Improvement Size: (Stated in units of comparison)	N/A	N/A
Building Setback (Feet)	N/A	N/A
# of Feet Building is Above (+), at (0), or Below (-) Road Grade:	N/A	N/A
# Parking Spaces:	N/A	N/A
Corner Influence:	No Corner	No Corner
Primary Frontage (Linear Feet):	600' +/- on Spanish Wells Road	Same
Total Frontage(s) (Linear Feet):	600' +/-	Same
Ingress/Egress: Primary Road Secondary Road(s)	Full Access N/A	Full Access N/A
Zoning Conformity:	Legal Conforming	Legal Conforming

(6)

Site Size (SF):	84,071	76,214
Site Size (Ac.):	1.93	1.75
Present or Intended Use of Site:	Preservation (Describe if "Other")	Preservation (Describe if "Other")
Shape:	Irregular	Irregular
Size of Acquisition:	.18 acres, or 7,857 S.F.	

(7)

HIGHEST AND BEST USE		
As Vacant:	Preservation/residential/speculation	Same
As Improved:	N/A	N/A

(8)

Annual Market Rent per SF:	$ N/A	$ N/A

(9)

VALUE INDICATIONS		
Land Value:	$ 239,600	$ 217,210
Sales Comparison Approach:	$ 239,600	$ 217,210
Cost Approach:	$ N/A	$ N/A
Income Approach:	$ N/A	$ N/A
Final Value Indications:	$ 239,600	$ 217,210

(10)

Value of Acquisition:	$ 22,390

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

APPRAISAL DETAILS AND REQUIREMENTS

(11) PROPERTY RIGHTS APPRAISED: Fee Simple

(12) PURPOSE OF THE APPRAISAL: To estimate the difference in the market value of this property caused by the acquisition of the right of way for the proposed construction of this project.

(13) INTENDED USE: To assist the South Carolina Department of Transportation in negotiations with the property owner concerning an eminent domain acquisition.

Market value is defined as "The most probable price, as of a specified date, in cash, or in terms equivalent to cash, or in other precisely revealed terms, for which the specified property rights should sell after reasonable exposure in a competitive market under all conditions requisite to a fair sale, with the buyer and seller each acting prudently, knowledgeably, and for self-interest, and assuming that neither is under undue duress.
SOURCE: The Appraisal Institute, The Dictionary of Real Estate Appraisal, 4th Edition

(14) EXPOSURE TIME: 12 months

(15) FIVE-YEAR SALE HISTORY:

Date	Sale Price	Deed Reference
03/02/10 S; 03/16/10 R	$1,267,005.20	2940/2266
03/27/09 S; 03/30/09 R	$639,000	2826/327
03/02/09 S; 03/30/09	$300,000	2826/319
05/06/04 S; 07/21/05 R	$10.00	2191/2182
Comments: The most recent transfer of the subject property included several parcels.		

(16) CURRENT LISTING: N/A PENDING CONTRACT: N/A

(17) ASSESSMENT AND TAXES:

Tax Parcel ID #: R511-007-000-075A

Tax Year: 2013

Land Value: $ 183,900 Improvement Value: $ 0 Total Assessed Value: $ 11,034

Real Estate Taxes: $ 9.48

(18) CURRENT ZONING ANALYSIS:

District: SMU, Stoney Mixed Use District Current Conformity: Legal Conforming

MININUM REQUIREMENTS:

Front Setback: 40 feet

Rear Setback: 50 foot BSL according to plat

Side Setback: Varies

Building Height: Varies

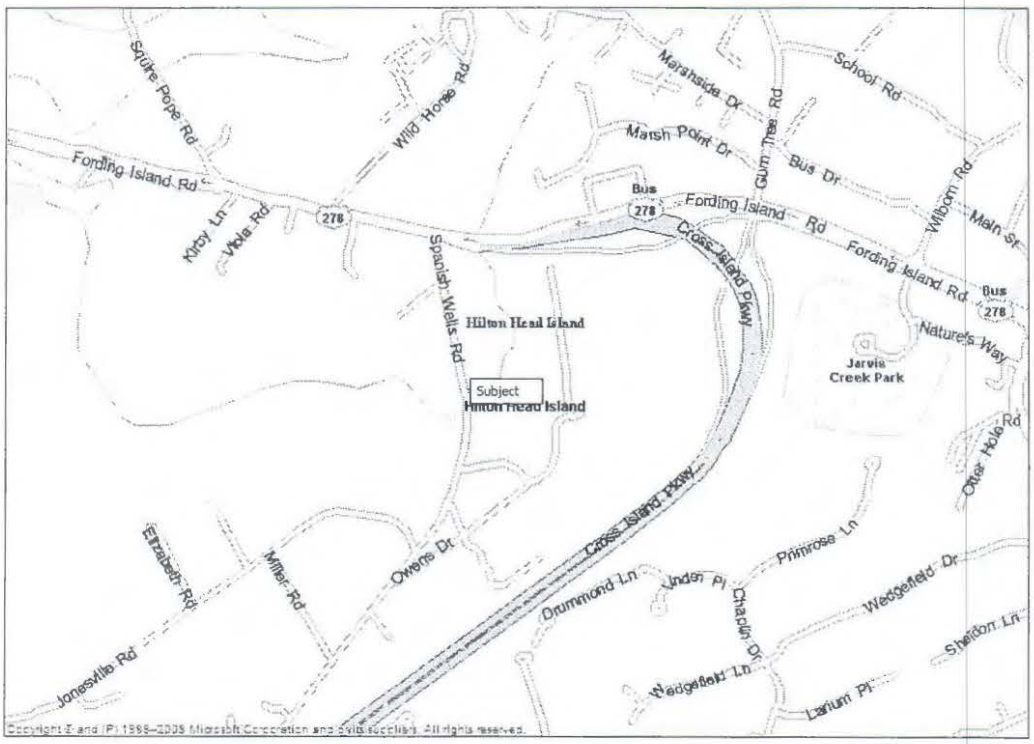
Parking Spaces: Varies

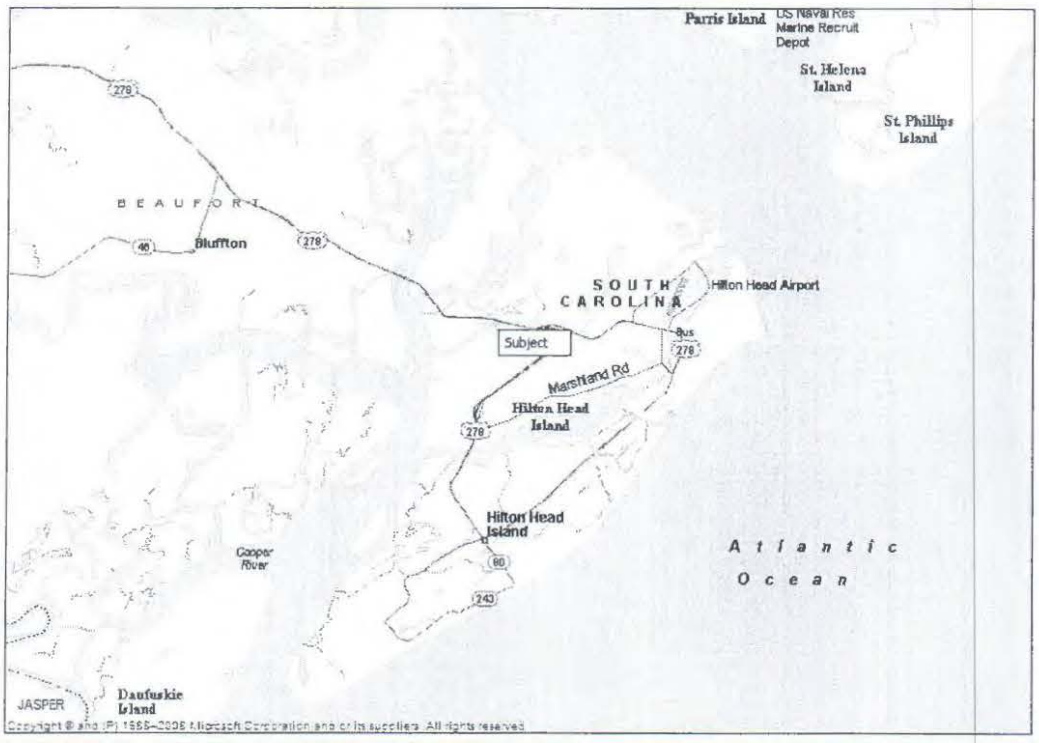
Road Frontage: N/A

Maximum Building Size: N/A

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUBJECT LOCATION MAP





File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUBJECT PHOTOGRAPHS (1-3)

Address/Location: Spanish Wells Road, Hilton Head Island, South Carolina

Photos Taken By: Stuart M. Saunders, MAI, CCIM **Date of Photos:** August 5, 2014

1. Front, southeasterly view of subject from across Spanish Wells Road.

2. Southerly view of subject's frontage along Spanish Wells Road.

3. Northerly view of subject's frontage along Spanish Wells Road.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUBJECT PHOTOGRAPHS (4-6)

Address/Location: Spanish Wells Road, Hilton Head Island, South Carolina

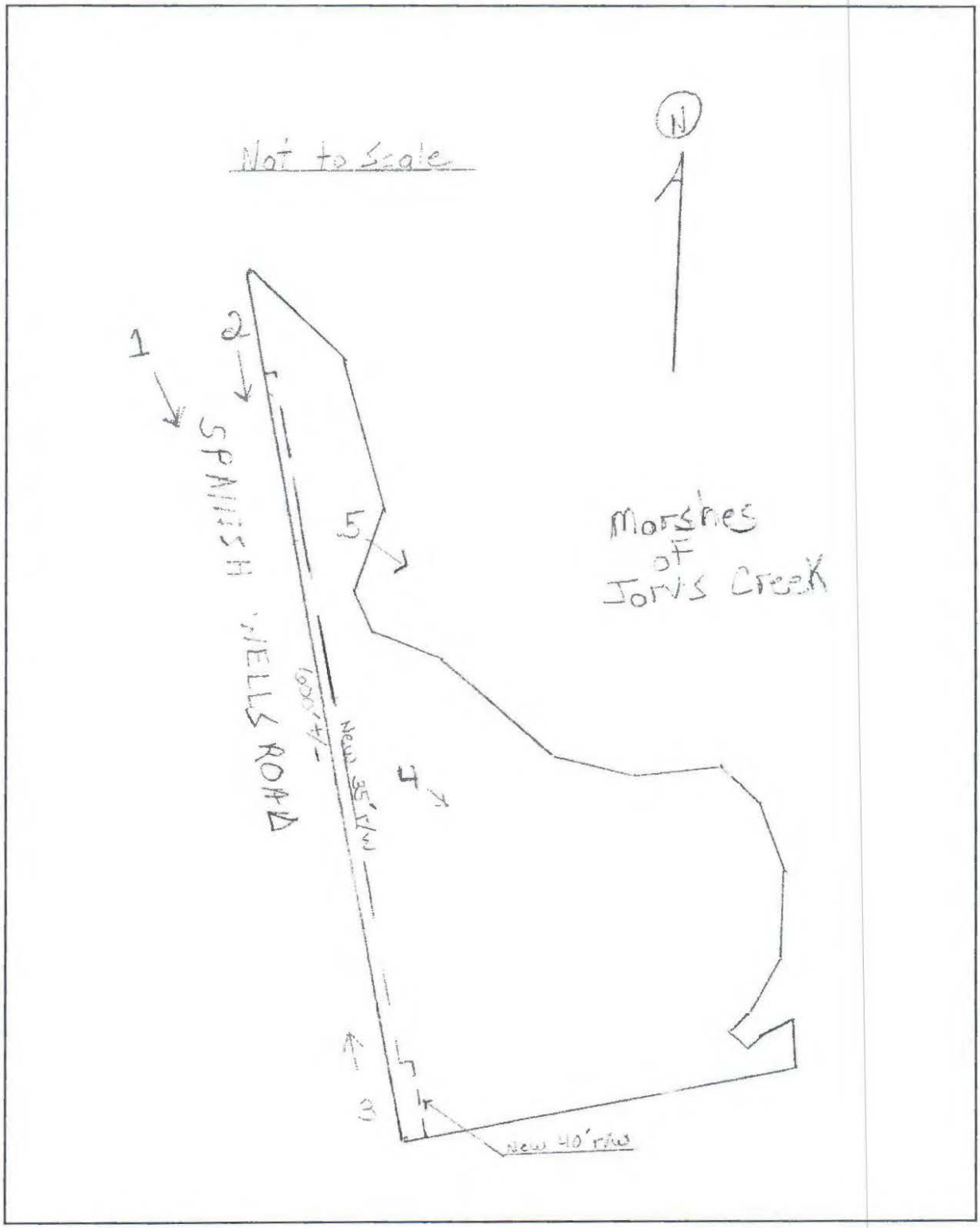
Photos Taken By: Stuart M. Saunders, MAI, CCIM **Date of Photos:** August 5, 2014

4. Interior view of subject.

5. Marshes of Jarvis Creek from rear of site.

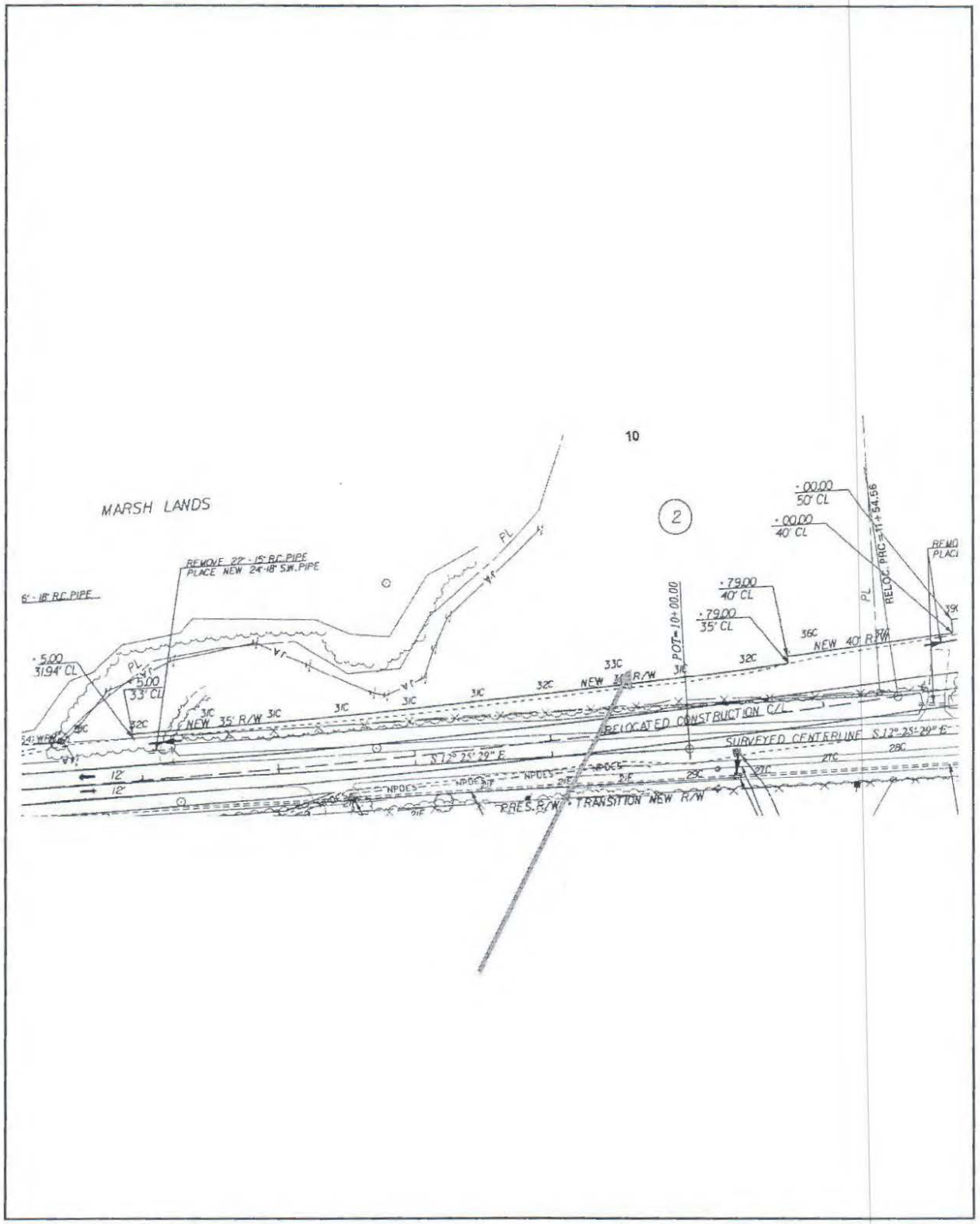
File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUBJECT SKETCH



File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

SUBJECT PLAN SHEET



PARAGRAPH 19. SCOPE OF WORK:

The subject is an undeveloped property located with frontage on Spanish Wells Road and the marshes of Jarvis Creek. It is located within the town limits of Hilton Head Island, Beaufort County, South Carolina.

.18 acres, or 7,857 square feet, is being acquired across the front of the subject along Spanish Wells Road for the replacement of Jarvis Creek Bridge.

This appraisal arrives at an opinion as to the fair market value of the acquisition. The appraisal involves an inspection of the subject, a thorough research of market data including comparable unit sales, and prevailing asking prices and terms for similar properties. Trends in the market are analyzed that would impact the value of the property and a determination is made as to the Highest and Best Use of the property both before and after the acquisition. The appropriate valuation techniques based on market data and analysis in concert with the Highest and Best Use conclusion are applied.

The Sales Comparison Approach is used to arrive at an opinion of market value for the subject land before and after the acquisition. The Cost Approach is not performed because the subject is undeveloped. The Income Approach is not performed because it does not appear that the property is subject to a ground lease and the fee simple value is appraised.

The steps taken in completion of this assignment are outlined as follow:

Property Identification/History: The subject property is identified through the Beaufort County public records as well as the plans for the project and other information provided by the Right of Way Agent.

Property Inspection: Stuart M. Saunders, MAI, CCIM conducted an on-site inspection of the subject property on August 5, 2014. The only purpose in visiting the property is to identify the characteristics and factors that impact the property's value on the date of the visit for a Right of Way Acquisition, and should not be considered, understood or relied upon to achieve any other objective or purpose. Aerial photographs were also utilized in the inspection of the property.

Property Description: A description of the subject property has been based upon the on-site inspection, public records and plans for the project.

Zoning and Restrictions: The subject's zoning has been obtained from the Town of Hilton Head Island. The subject deed was also reviewed for the presence of private restrictions.

Cost Approach: The Cost Approach is not applicable to this assignment.

Sales Comparison Approach: Sales of comparable properties were used to perform this approach to value. The appraiser conducted an on-site physical inspection of the sales when possible. The transfers were verified via public records and with the appraiser, broker, grantor, grantee or knowledgeable third party when possible.

Income Capitalization Approach: This approach to value is not applicable to the assignment.

Reconciliation: The indications of value before and after the acquisition are used to arrive at an opinion as to the difference in the market value of the subject caused by the acquisition of the right of way for the proposed construction of this project.

This narrative appraisal report is presented in a summary format. The report is completed in conformance with the Uniform Standards of Professional Appraisal Practice and with the Code of Ethics and the Standards of Professional Practice of the Appraisal Institute.

The conclusions have been reported in a SCDOT Standard format Appraisal Report in accordance with the Uniform Standards of Professional Appraisal Practice (USPAP). Plans were furnished to show the acquisition area for right of way and are assumed to be correct.

Adequate data was available to complete the analysis. The before value is subject to the extraordinary assumption that the new right of way acquisition does not exist and will not exist. The after value is subject to hypothetical condition recognizing the value of the subject as if new right of way acquisition has already existed.

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

PARAGRAPH 20-A. DESCRIPTION OF REALTY (BEFORE):

SITE DESCRIPTION

Present Use	Undeveloped
Site Size	1.93 acres or 84,071 square feet. It is recommended that a qualified surveyor inspect the subject for existing property lines and easements that are unable to be detected by the appraiser(s).
Curb and Gutters	None
Sidewalk	None
# of Lanes	There are two (2) travel lanes along Spanish Wells Road in front of the subject.
Traffic Level	The traffic flow in front of the subject appears to be light to moderate.
Traffic Control	None
Shape	Subject has an irregular shape.
Ingress/Egress	Subject has full access from Spanish Wells Road.
Access to the Improvements	N/A
Frontage	The subject has approximately 600 feet of road frontage. It also has frontage along the marshes of Jarvis Creek.
Grade at Road Level	At Grade
Visibility/Exposure	Good

Topography	The subject is generally level and mostly wooded.
Drainage	Adequate
Flood Plain:	
Map Number	4502500008D
Date	September 29, 1986
Zone	A, high flood risk
Landscaping	None
Utilities	
Water	Present
Sewer	Present
Electricity	Present
Natural Gas	N/A
Telephone	Present

Zoning	
Designation	SMU, Stoney Mixed Use District
Uses Allowed	This district is designed to encourage cooperation between property owners in developing their properties, provide connectivity between properties, and create more pedestrian oriented uses than traditional

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

	commercial development. A mix of residential, commercial, office, and some resort accommodations are permitted.
Easements/ Encroachments	Based upon my inspection and examination of the subject site, as well as my review of plats and deeds of the property, I did not detect adverse easements other than normal utility easements and rights of way. These are not believed to have a detrimental impact on property value. **It should be noted that I am not qualified to detect easements and encroachments and legal counsel should be retained if there are any indications of title defects.**
Environmental	I am unawareof potential environmental hazards on the property. Environmental aspects of the subject property are beyond my expertise. If necessary, I recommend a professional in environmental expertise be retained.
Comments	A 50 foot building setback line common with marshes of Jarvis Creek runs across the rear of the property.
Personal Property, FF&E, etc. (Included in the estimate of value)	N/A
Relocation Items (Not included in the estimate of value)	N/A

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

PARAGRAPH 20-B. DESCRIPTION OF REALTY (BEFORE):

IMPROVEMENT DESCRIPTION

Business Name (if applicable)	N/A
Improvement Size (Stated in Units of Comparison)	N/A
Year Built	
Estimated Effective Age	N/A
Estimated Economic Life	N/A
Type/Quality of Construction	N/A
Additions/Renovations	N/A
Foundation	N/A
Exterior Walls/Windows	N/A
Roof	N/A
Special Features	N/A
Exterior Condition	Overall exterior condition is N/A.

Interior Walls/Ceilings	N/A
HVAC	N/A
Flooring Covering	N/A
Lighting	N/A
Plumbing	N/A
Interior Condition	Overall interior condition is N/A.

Site Improvements	N/A
Parking	N/A
Utility	The property appears to have N/A utility and amenities for the existing utilization.
Comments	N/A
Personal Property, FF&E, etc. (Included in the estimate of value)	N/A
Relocation Items (Not included in the estimate of value)	N/A

PARAGRAPH 21. HIGHEST AND BEST USE (BEFORE):

Highest and Best Use is defined in The Appraisal of Real Estate – 13th Edition as, "The reasonably probable and legal use of vacant land or an improved property, that is physically possible, legally permissible, appropriately supported, financially feasible, and that results in the highest value."

AS VACANT:

Physically Possible:

The subject site has an irregular shape and contains 1.93 acres, or 84,071 square feet. It has approximately 600 feet of frontage along Spanish Wells Road as well as good frontage along the marshes of Jarvis Creek. It is generally level and wooded with good visibility and full access from the road. All necessary public and private utilities are available for development of the site.

Legally Permissible:

The subject is zoned SMU, or Stoney Mixed Use District, by the Town of Hilton Head Island. This district permits a variety of uses.

Financially Feasible/Maximally Productive:

Residential, preservation and speculation are all financially feasible and maximally productive for the subject parcel.

Therefore, based on the preceding discussion my opinion of the highest and best use of the property, as vacant and available for development, is for residential, preservation and speculative utilization.

AS IMPROVED:

Physically Possible:
N/A

Legally Permissible:
N/A

Financially Feasible/Maximally Productive:

N/A
Therefore, based on the preceding discussion my opinion of the highest and best use of the subject property, as improved, is for N/A

PARAGRAPH 22. VALUATION BEFORE THE ACQUISITION:

Land value is derived separately using the sales comparison approach and a minimum of three comparable sales. The South Carolina Department of Transportation requires that the Sales Comparison Approach be demonstrated for all improved properties unless unusual circumstances preclude its development or the improvements are determined to be unaffected by the acquisition. The Cost Approach shall be considered when the impacted improvements are less than ten years old, a special-use property, or when sufficient comparable sale or lease information is not available. The SCDOT requires application of the Income Approach on all investment and income-producing properties where existing improvements might be impacted by the project.

PARAGRAPH 22-A. SALES COMPARISON APPROACH TO VALUE (BEFORE)

The Sales Comparison Approach uses four (4) comparable land sales to appraise the subject land. The sales are charted and mapped along with comparable sales sheets in the Sales Brochure.

An adjustment grid is provided within the following pages, and the sales are given adjustments for location, size, shape and marsh/view. The sales price per square foot of effective land area is the chosen unit of comparison. The sales are discussed below.

Land Sale 7 is 15,682 square foot residential lot located in Palmetto Hall. It transferred for $86,150, or $5.49 per square foot, on January 21, 2014. The rear of this lot is adjacent to a lagoon, which in turn is adjacent to the golf course. A downward adjustment of 15% is given to Sale **7** because its location at the end of cul-de-sac within a private community is considered superior to the subject property. It is also given a downward adjustment of 15% for size since smaller sized properties typically sell for more on a per unit basis than larger properties, all other elements of comparison being equal. Land Sale **7** brackets the upper end of the range with an adjusted price per square foot of $3.84.

Land Sale 10 is a residential lot with 25,281 square feet that sold on March 13, 2014 for $78,000, or $3.09 square foot. The rear of the lot is adjacent with Dillon Road while the southwest and southeast property lines are adjacent to a golf course and cart path. Land Sale 10 is not given an adjustment for location because the rear of the lot backs to Dillon Road and the front is adjacent to a golf cart path. It is given downward adjustments of 15% for superior size and shape, in comparison to the subject. Land Sale 10 establishes the lower end of the range with an adjusted price of $2.62 per square foot, after an upward adjustment of 15% is given for lack of marsh view.

Land Sale 11 with 21,780 square feet is located along the marshes of Jarvis Creek at the end of Kirby Lane. It transferred on July 14, 2014 for $70,000, or $3.21 per square foot. An upward adjustment of 15% is applied for the inferior location of this parcel at the end of dirt lane. Land Sale 11 reflects an adjusted price of $2.73 per square foot after downward adjustments of 15% are given for smaller size and superior shape, in comparison to the subject.

Land Sale 12 is located at 152 Dillon Road and has 57,935 square feet of highlands. It transferred on June 3, 2014 for $165,000, or $2.85 per square foot. This property compares well to the subject and is not given any adjustments.

SALES COMPARISON APPROACH (BEFORE) CONCLUSION:

The adjusted prices range from $2.62 to $3.84 per square foot. Sale 12 compares the best to the subject and is weighted the most in arriving at an opinion of value toward the middle of the range.

The indicated market value of the subject is shown as follows:

84,071 S.F.	X	$ 2.85 per square foot	=	$ 239,602
	X	$ per unit	=	$
Rounded to:	**$ 239,600**			

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 2

TRACT 2

Comparable Sale	7	10	11	12
Sale Date	Jan-14	Mar-14	Jul-14	Jun-14
Size (SF)	15,682	25,281	21,780	57,935
Price / SF	$5.49	$3.09	$3.21	$2.85
Adjustments				
Property Rights	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Financing Terms	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Conditions of Sale	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Market Conditions	0.00%	0.00%	0.00%	0.00%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Location / Exposure	-15%	0%	15%	0%
Frontage / Access	0%	0%	0%	0%
Size	-15%	-15%	-15%	0%
Shape	0%	-15%	-15%	0%
Topography	0%	0%	0%	0%
Utilities	0%	0%	0%	0%
Marsh/View	0%	15%	0%	0%
Easements	0%	0%	0%	0%
Sub-Total Adjustments	-30%	-15%	-15%	0%
Adjusted Price	$3.84	$2.62	$2.73	$2.85

PARAGRAPH 22-B. COST APPROACH TO VALUE (BEFORE):

N/A

PARAGRAPH 22-C INCOME CAPITALIZATION APPROACH TO VALUE (BEFORE)

N/A

PARAGRAPH 23. RESOLUTION OF BEFORE VALUE AND VALUE ESTIMATE:

Sales Comparison Approach - There were several recent sales of comparable properties, and this approach provides a reliable indication of value for the subject property of $239,600.

Cost Approach - N/A

Income Approach - N/A

Therefore, based on the information contained in this report, the market value of the subject property as of the date of this report is estimated to be $239,600.

PARAGRAPH 24. DESCRIPTION OF THE ACQUISITION:

Land

There is .18 acres, 7,857 square feet, of permanent right of way being purchased along most of the subject's frontage with Spanish Wells Road. The area of acquisition has an irregular shape, is generally level and mostly wooded. It has a length of approximately 600 feet and depth of 3 feet to 37 feet.

Improvements

The acquisition is undeveloped.

PARAGRAPH 25. DESCRIPTION OF THE REMAINDER:

The Department of Transportation is relocating Spanish Wells Road in front of the subject in order to accommodate the new bridge being constructed over Jarvis Creek. Spanish Wells Road will still have two (2) lanes, and except for its reduction in size to 76,214 square feet, the subject is essentially unaffected by the acquisition. The subject will still be generally at road grade with full access and good visibility from the road.

In my opinion, there are no damages or benefits to the remainder.

PARAGRAPH 26. HIGHEST AND BEST USE (AFTER):

AS VACANT:

The highest and best use of the site is the same as in the before situation.

Therefore, based on that preceding discussion, my opinion of the highest and best use of the subject property, as vacant and available for development, after the proposed road construction is for residential, preservation, or speculative purposes.

AS IMPROVED:

N/A

PARAGRAPH 27. VALUE AFTER THE ACQUISITION:

"After" values and conclusions are based upon plans provided by the SCDOT and the completion of the proposed road construction.

Consideration has been given to relevant aspects of the property affected by the acquisition for analysis and comparison to the subject's "before" condition and the comparable data.

PARAGRAPH 27-A. SALES COMPARISON APPROACH TO VALUE (AFTER):

EXPLANATION OF ADJUSTMENTS:

The price per square foot value of the remainder is the same as before the acquisition.

VALUATION (AFTER) CONCLUSION:

The value of the subject in the after situation is shown as follows:

76,214 S.F.	X	$ 2.85 per S.F.	=	$ 217,210
	X	$ per unit	=	$
Rounded to:		**$ 217,210**		

PARAGRAPH 27-B. COST APPROACH TO VALUE (AFTER):

N/A

PARAGRAPH 27-C. INCOME CAPITALIZATION APPROACH TO VALUE (AFTER)

N/A

PARAGRAPH 28. RESOLUTION OF AFTER VALUE AND VALUE ESTIMATE:

Sales Comparison Approach - The appraised value of the subject after the acqusition is well supported at $217,210.

Cost Approach - N/A

Income Approach - N/A

The Sales Comparison Approach would be relied upon by a potential purchaser. There was an ample supply of comparable sales, and the indication of value by this approach is well supported.

Therefore, based on the information contained in this report, the market value of the subject property after the acquisition is estimated to be $217,210.

PARAGRAPH 29. UNECONOMIC REMAINDER:

UNECONOMIC REMNANT – A parcel of real property in which the owner is left with an interest after the partial acquisition of the owner's property, and which the acquiring agency has determined has little or no value or utility to the owner.
NOTE: An uneconomic remnant may have substantial "market" value and still have little or no value or utility to the owner. *(Appraisal Guide; Federal Highway Administration).*

The subject has good utility to the owner and is not considered to be an uneconomic remainder.

N/A

Remainder Size	X	$	per unit	X	Residual Value %	=	$
Rounded to:					$		

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

DISTRIBUTION OF VALUES

(30)	Value Components:	Before (Paragraph 22)	After (Paragraph 27)	Difference
	Land Value:	$239,600	$217,210	$22,390
	Building Value:	$0	$0	$0
	Site Improvements:	$0	$0	$0
	TOTAL:	**$239,600**	**$217,210**	**$22,390**

(31)	Value Components of the Acquisition:				
	Right of Way Acquired: 7,857 sf of permanent right of way				
	Land:	7,857.00	acres/sf @:	$2.85	**$22,392**
	Value of Buildings within the Acquisition Area:				$0
	Value of Site Improvements within the Acquisition Area:				$0
	Total for the Acquisition:				**$22,390**
	plus Damages (if any to the remainder)				$0
	less Benefits (if any to the remainder)				$0
	Total for the Acquisition (Right of way, plus damages, less benefits):				**$22,390**

(32)	Final Statement of Value:		
	a)	Having considered all applicable approaches, it is my opinion that the indicated value of the whole property before the acquisition is:	**$239,600**
	b)	Having considered all applicable approaches, it is my opinion that the indicated value of the whole property after the acquisition is:	**$217,210**
	c)	The difference between the indicated value of the property before the acquisition, and the indicated value of the remainder, after the acquisition is:	**$22,390**

(33) Based on this report, the fair market rental for this property is: **N/A** per month.

(Indicate monthly rental if building improvement is located within the new right of way or it the current occupant will be displaced as a result of the acquisition.

The appraisal is made as of: 5-Aug-14

Date of Appraisal 14-Aug-14

Stuart M Saunders

Stuart M. Saunders, MAI, CCIM
S.C. Certified General Real Estate Appraiser
CG 1405

S.C. Real Estate Appraiser

GENERAL ASSUMPTIONS AND LIMITING CONDITIONS

General Assumptions - This appraisal has been completed and the appraisal report prepared with the following **general assumptions**:

1. No responsibility is assumed for the legal description or for matters including legal or title considerations. The titles to the property are assumed to be good and marketable unless otherwise stated. Any plats, maps, or photographs in this appraisal are used merely to help the reader visualize the property and its surroundings and are not certified to be accurate.
2. Any liens or encumbrances (except for any lease encumbrance that might be referred to in the appraisal) which may exist have been disregarded, and the property has been appraised as though no delinquency in the payment of general taxes or special assessment exists and as though free of indebtedness.
3. It is assumed that the utilization of the land and improvements are within the boundaries of the lines of the property described and that there is no encroachment or trespass unless noted in the report. No survey of the subject property was made or caused to be made by us, and no responsibility is assumed for the occurrence of such matters.
4. A visual inspection of the subject site was made and all engineering is assumed to be correct. The plot plan and illustrative materials in this report are included only to assist the reader in visualizing the property and to show the reader the relationship of its boundaries. The appraiser is not a construction engineer and is not responsible for structural or cosmetic inadequacies associated with any of the improvements unless otherwise noted in the report.
5. It is assumed that there are no hidden or unapparent conditions of the property, subsoil, or structures that render it more or less valuable. No responsibility is assumed for such conditions or for arranging for engineering studies that may be required to discover them. The soil for the area under appraisal appears to be firm and solid, unless otherwise stated. Subsidence in the area is unknown or uncommon, and the appraiser(s) does not warrant against this condition or occurrence.
6. Subsurface rights (minerals and oil) were not considered in this appraisal unless otherwise stated. In addition, no potential timber value was considered.

General Assumptions Continued

7. It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless noncompliance is stated, defined, and considered in the appraisal report. Unless otherwise stated in this report, the appraiser did not observe the existence of hazardous materials or gases, which may or may not be present on the property. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or other potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there are no such materials on or in the property, which would cause a loss in value. No responsibility is assumed for any such conditions or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired.
8. It is assumed that all applicable zoning and use regulations and restrictions have been complied with, unless a nonconforming use has been stated, defined, and considered in the appraisal report.
9. It is assumed that all required licenses, certifications of occupancy, consents, or other legislative or administrative authority from any local, state, or national government or private entity or organization have been or can be obtained or renewed for any use on which the value estimate contained in this report is based.
10. This appraisal assumes water and sewer services will always be provided for the subject.
11. Responsible ownership and competent property management are assumed.
12. The Americans with Disabilities Act ("ADA") became effective January 26, 1992. I (we) have not made a specific compliance survey and an analysis of this property to determine whether or not it is in conformity with the various detailed requirements of the ADA. It is possible that a compliance survey of the property, together with a detailed analysis of the requirements of the ADA, could reveal that the property is not in compliance with one or more of the requirements of the Act. If so, this fact could have a negative impact on the value of the property. Since I (we) have no direct evidence relating to this issue, I (we) did not consider

General Assumptions Continued

non-compliance with the requirements of ADA in estimating the value of the property.

13. There is currently a good deal of discussion regarding the potential hazards of Electro-Magnetic Fields and the possible health risk of being located near high voltage transmission lines. I (we) have not made a specific compliance survey and analysis of this property to determine whether or not there are potentially hazardous effects from EMF's. It is possible that a compliance survey of the property together with a detailed analysis could reveal that there is EMF levels, which are above a safe level. If so, this fact could have a negative impact on the value of the subject property. Since I (we) have no direct evidence relating to this issue, I (we) did no consider EMF levels in estimating the value for the property.

General Limiting Conditions – This appraisal has been completed and the appraisal report has been prepared with the following **general limiting conditions**.

1. The distribution, if any, of the total valuation in this report between land and improvements applies only under the stated program of utilization. The separate allocations for land and buildings must not be used in conjunction with any other appraisal and are invalid if so used. The value estimates provided in the report apply to the entire property, and any proration or division of the total into fractional interests will invalidate the value estimate, unless such proration or division or interests has been set forth in this report.
2. Neither possession of this appraisal or copy thereof carries with it the right to publication, nor may it be used for any purpose by anyone but the applicant without previous consent of the appraiser(s).
3. The appraiser, by reason of this appraisal, is not required to give further consultation, testimony, or be in attendance in court with reference to the property in question unless arrangements have been previously made.
4. Neither all no part of the contents of this report (especially as to value, the identity of the appraiser, or the firm with which the appraiser is associated) shall be disseminated to the public through advertising, public relations, news, sales, or other media without the prior written consent and approval of the appraiser.

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

General Limiting Conditions Continued

5. Information, estimates, and opinions contained in this report are obtained from sources considered reliable, however the appraiser assumes no liability for such sources.
6. The information supplied to the appraiser is considered to be accurate. The information supplied by the client has been accepted without further verification as correctly reflecting the property's current condition unless otherwise noted.
7. The various estimates of value presented in this report apply to this appraisal only and may not be used out of the context presented herein. This appraisal is valid only for the appraisal date or dates specified herein and only for the appraisal purpose specified herein.
8. **The intended user and only user of this report is the South Carolina Department of Transportation for the intended use to assist them in an eminent domain acquisition**.
9. My analysis, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
10. The analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics and the Uniform Standards of Professional Appraisal Practice of The Appraisal Institute.
11. The reported analysis, opinions and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analysis, opinions, and conclusions.

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 2

CERTIFICATE OF APPRAISER

I Hereby certify:

That I have personally inspected the property herein and that I have also made a personal field inspection of the comparable sales relied upon in making this appraisal. The subject and the comparable sales relied upon in making the appraisal were as represented in the comparable data brochure which supplements this appraisal.

That to the best of my knowledge and belief the statements contained in the appraisal herein set forth are true, and information upon which the opinions expressed therein are based is correct: subject to the limiting conditions therein set forth.

That I understand that such appraisal may be used in connection with acquisition of right of way for a highway to be constructed by the State of South Carolina with the assistance of Federal-aid highway funds, or other Federal Funds.

That such appraisal has been made in conformity with the appropriate State and Federal laws regulations, policies and procedures applicable to that appraisal of right of way for such purposes; and that to the best of my knowledge, no portion of the value assigned to such property consists of items, which are non-compensable under the established law of South Carolina.

That neither my employment nor my compensation for preparing this appraisal report is in any way contingent upon the values reported herein.

That I have no direct or indirect present or contemplated future personal interest in such property or in any benefit from the acquisition of such property appraised.

That I have not revealed the findings and results of such appraisal to anyone other than the proper officials of the South Carolina Department of Transportation or officials of the Federal Highway Administration and I will not do so until so authorized by the State officials or until I am required to do so by due process of law, or until I am released from this obligation by having publicly testified as to such findings.

That the owner or his designated representative was given the opportunity to accompany me during my inspection of the property.

That I have not provided any services regarding the subject property within the prior three years, as an appraiser or in any other capacity.

That any decrease or increase in the fair market value of the real property prior to the date of valuation caused by the public improvement for which such property is being acquired, or by the likelihood that the property would be acquired for such improvement, other than that due to the physical deterioration with in the reasonable control of the owner, has been disregarded in determining the compensation for the property.

That my opinion of the fair market value of the acquisition as of August 5, 2014 is **$22,390** based upon my independent appraisal and the exercise of my professional judgment.

As of the date of this report, I have completed the requirements for continuing education as set forth by the Uniform Standards of Professional Appraisal Practice and The Appraisal Institute.

Stuart M. Saunders

Date: August 14, 2014

Stuart M. Saunders, MAI, CCIM
Inspecting Appraiser
State Certified General Real Estate Appraiser
#CG 1405

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 4

SUMMARY APPRAISAL REPORT

(1) Tract Location: East side of Spanish Wells Rd., Hilton Head Island, S.C.
Property Owner: Beaufort County & Town of Hilton Head Island
Address: 1 Town Center Court, Hilton Head Island, S.C. 29928

Areal View of Subject Property

PREPARED FOR:
South Carolina Department of Transportation

(2) Prior to inspection the owner was contacted by telephone and invited to be present during inspection of this property. The tract was inspected on August 5, 2014 and I was accompanied by nobody.
Required by Sec. 102 (c) 1of Uniform Act.
Explain: (Why not accompanied, relation of representative, items discussed, etc.)

I contacted Mr. Rob McFee with Beaufort County and Mr. Scott Liggett with the Town of Hilton Head Island by email prior to the inspection. I also left a telephone message for Mr. McFee. The emails and telephone call were not returned, and I inspected the subject property alone on August 5, 2014. I spoke with Mr. McFee via telephone after the inspection, and he did not feel it was necessary to meet me on-site.

A couple of employees with the Town of Hilton Head Island also telephoned after the inspection, and we discussed the acquisition. It was explained that I would be on the island again August 12, 2014 and to contact me if a representative for the Town of Hilton Head wished to meet on-site. I did not hear back from the Town.

AUG 18 2014

SCDOT
SOUTHERN R/W OFFICE

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 4

PREPARED BY:

(3) **Stuart M. Saunders, MAI, CCIM**
S.C. State Certified General R/E Appraiser #: CG 1405

Firm Name: Saunders & Associates,

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 4

APPRAISAL SUMMARY

(4) Property Owner: Beaufort County & Town of Hilton Head Island
Tract Location: East side Spanish Wells Rd., Hilton Head Island, S.C.
Date of Appraisal: 08/14/14 Date of Value: 08/5/14

(5)

DESCRIPTION	BEFORE	AFTER
Present Use:	Undeveloped (Describe if "Other")	Same (Describe if "Other")
Number of Buildings:	0	0
Primary Improvement Size: (Stated in units of comparison)	N/A	N/A
Building Setback (Feet)	N/A	N/A
# of Feet Building is Above (+), at (0), or Below (-) Road Grade:	N/A	N/A
# Parking Spaces:	N/A	N/A
Corner Influence:	No Corner	No Corner
Primary Frontage (Linear Feet):	265' +/- on Spanish Wells Road	Same
Total Frontage(s) (Linear Feet):	265' +/-	Same
Ingress/Egress: Primary Road Secondary Road(s)	Full Access N/A	Full Access N/A
Zoning Conformity:	Legal Conforming	Legal Conforming

(6)

Site Size (SF):	60,984	48,568
Site Size (Ac.):	1.40	1.115
Present or Intended Use of Site:	Preservation (Describe if "Other")	Preservation (Describe if "Other")
Shape:	Irregular	Irregular
Size of Acquisition:	.285 acres, or 12,416 S.F.	

(7)

HIGHEST AND BEST USE		
As Vacant:	Preservation/residential/speculation	Same
As Improved:	N/A	N/A

(8)

Annual Market Rent per SF:	$ N/A	$ N/A

(9)

VALUE INDICATIONS		
Land Value:	$ 173,805	$ 138,420
Sales Comparison Approach:	$ 173,805	$ 138,420
Cost Approach:	$ N/A	$ N/A
Income Approach:	$ N/A	$ N/A
Final Value Indications:	$ 173,805	$ 138,420

(10)

Value of Acquisition:	$ 35,385

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APPRAISAL DETAILS AND REQUIREMENTS

(11) PROPERTY RIGHTS APPRAISED: Fee Simple

(12) PURPOSE OF THE APPRAISAL: To estimate the difference in the market value of this property caused by the acquisition of the right of way for the proposed construction of this project.

(13) INTENDED USE: To assist the South Carolina Department of Transportation in negotiations with the property owner concerning an eminent domain acquisition.

Market value is defined as "The most probable price, as of a specified date, in cash, or in terms equivalent to cash, or in other precisely revealed terms, for which the specified property rights should sell after reasonable exposure in a competitive market under all conditions requisite to a fair sale, with the buyer and seller each acting prudently, knowledgeably, and for self-interest, and assuming that neither is under undue duress.
SOURCE: The Appraisal Institute, The Dictionary of Real Estate Appraisal, 4th Edition

(14) EXPOSURE TIME: 12 months

(15) FIVE-YEAR SALE HISTORY:

Date	Sale Price	Deed Reference
03/02/10 S; 03/16/10 R	$1,267,005.20	2940/2266
03/26/09 S; 03/30/09 R	$790,000	2826/357
	$	
	$	
Comments: The most recent transfer of the subject includes several parcels and is 1/2 interest.		

(16) CURRENT LISTING: N/A PENDING CONTRACT: N/A

(17) ASSESSMENT AND TAXES:

Tax Parcel ID #: R511-007-000-075F

Tax Year: 2013

Land Value: $ 127,600 Improvement Value: $ 0 Total Assessed Value: $ 7,656

Real Estate Taxes: $ 47.39

(18) CURRENT ZONING ANALYSIS:

District: SMU, Stoney Mixed Use District Current Conformity: Legal Conforming

MININUM REQUIREMENTS:

Front Setback: 40 feet

Rear Setback: 20 foot BSL according to plat

Side Setback: Varies

Building Height: Varies

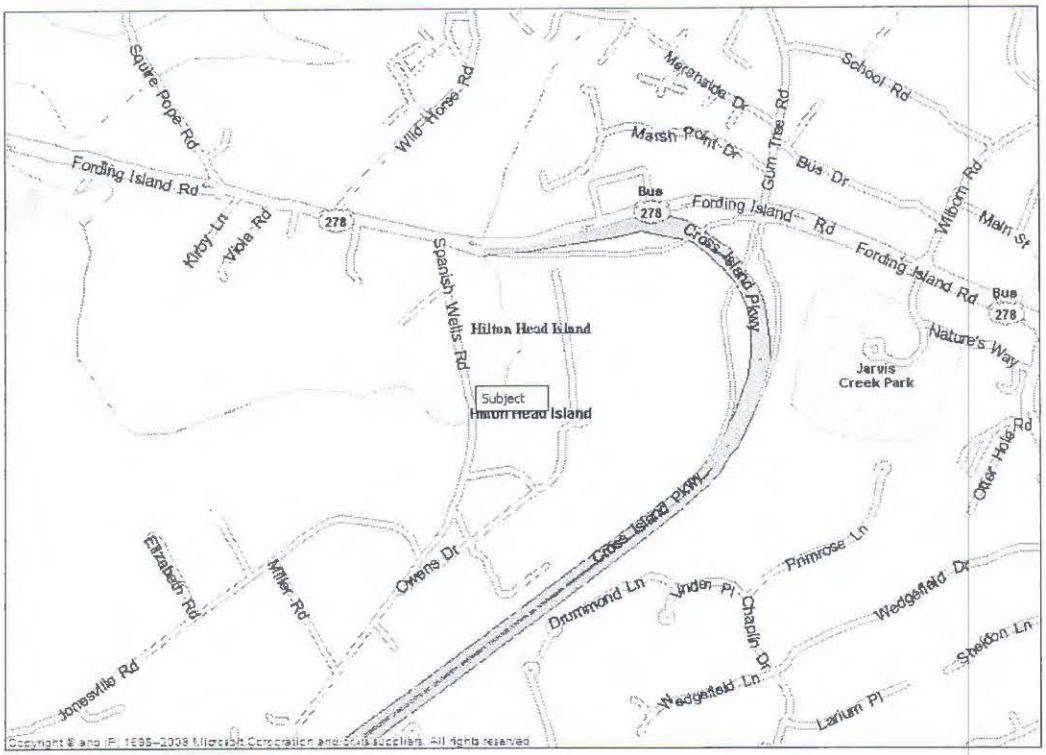
Parking Spaces: Varies

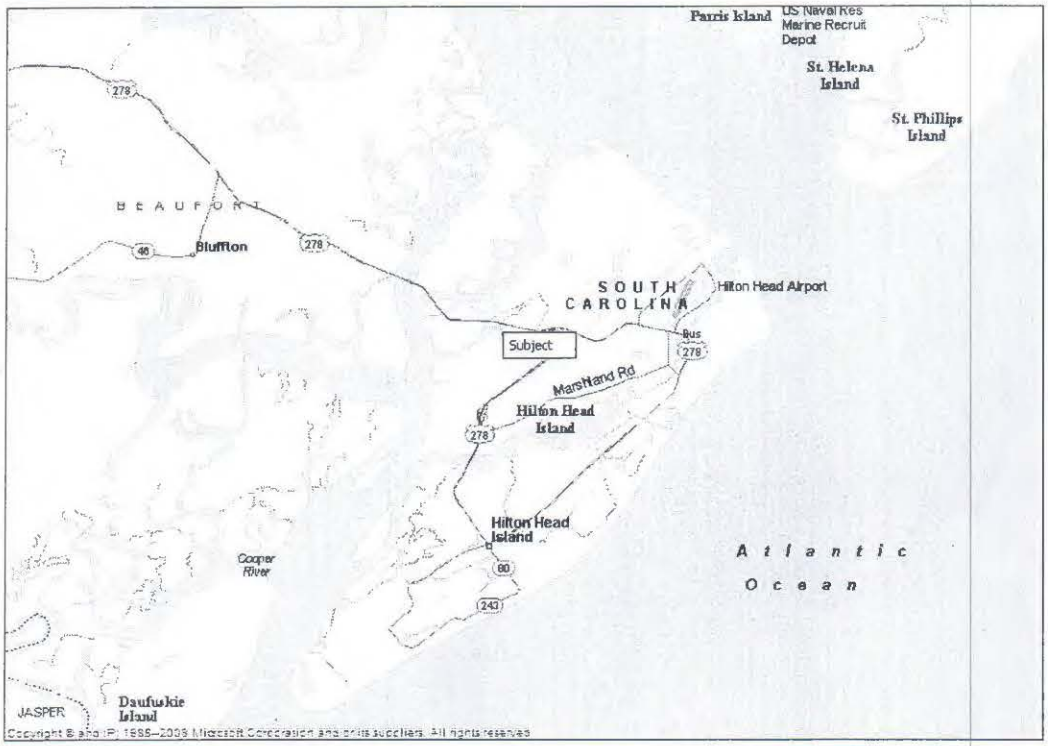
Road Frontage: N/A

Maximum Building Size: N/A

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 4

SUBJECT LOCATION MAP





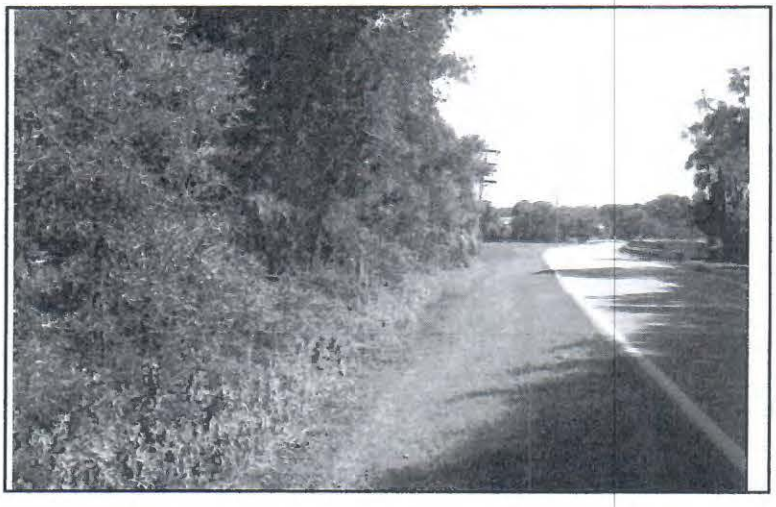
File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 4

SUBJECT PHOTOGRAPHS (1-3)

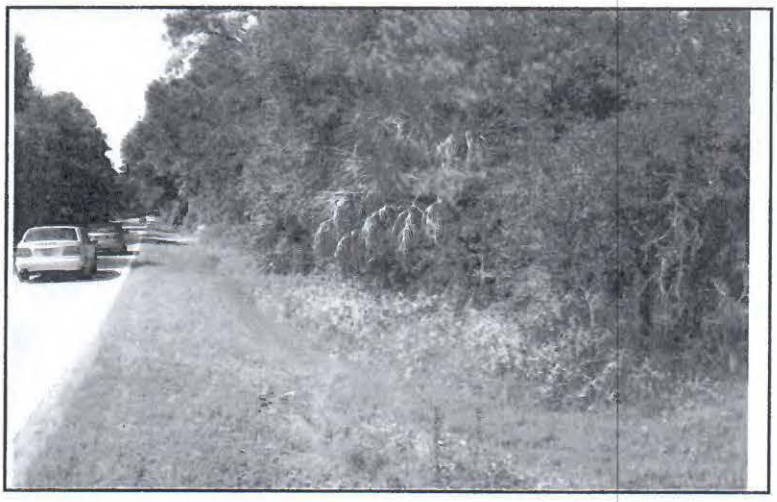
Address/Location: Spanish Wells Road, Hilton Head Island, South Carolina

Photos Taken By: Stuart M. Saunders, MAI, CCIM **Date of Photos:** August 5, 2014

1. Front view of subject property from across Spanish Wells Road.



2. Southerly view of subject's frontage along Spanish Wells Road.



3. Northerly view of subject's frontage along Spanish Wells Road.

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SUBJECT PHOTOGRAPHS (4-5)

Address/Location: Spanish Wells Road, Hilton Head Island, South Carolina

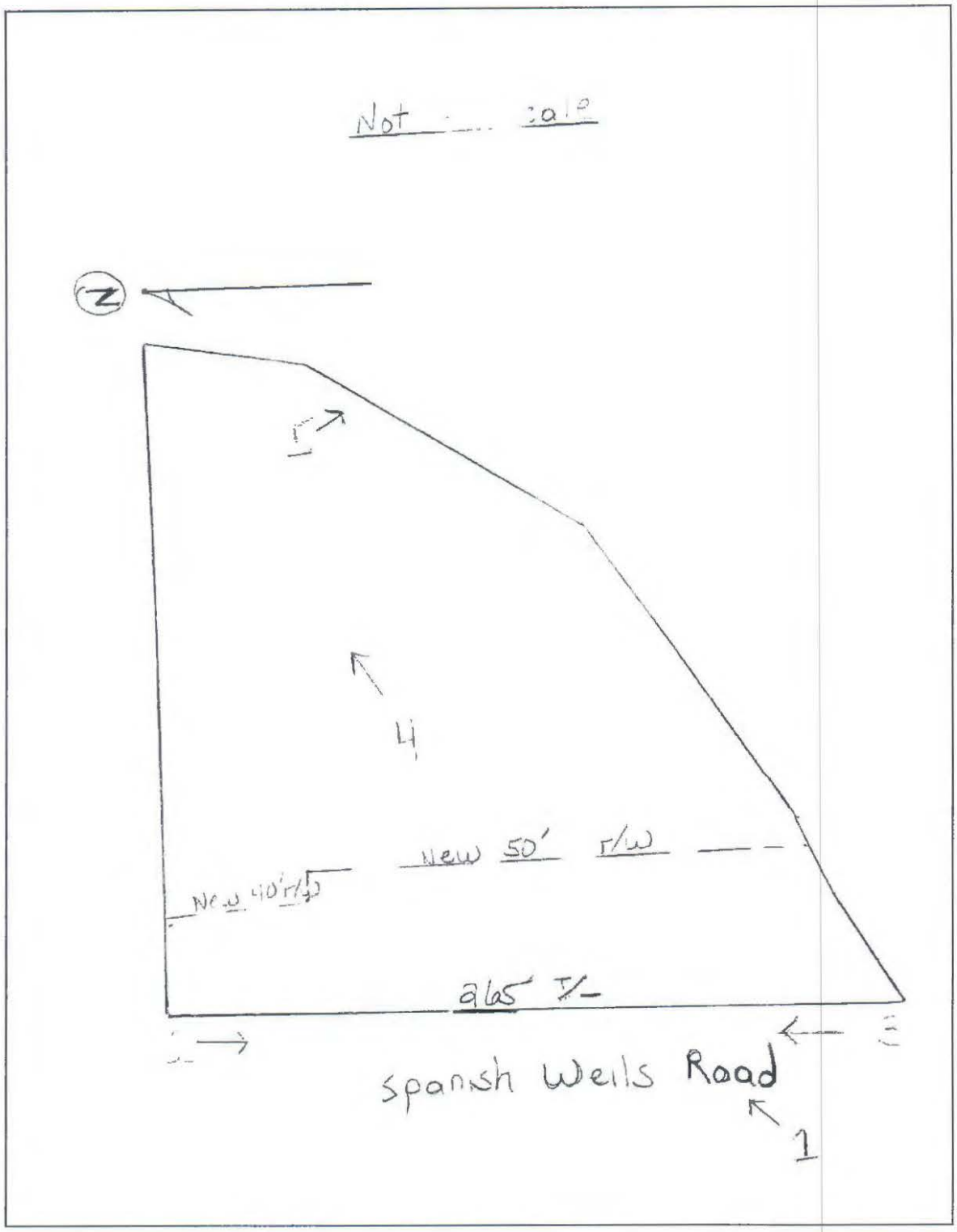
Photos Taken By: Stuart M. Saunders, MAI, CCIM **Date of Photos:** August 5, 2014

4. Interior view of subject.

5. Marshes of Jarvis Creek at rear of site.

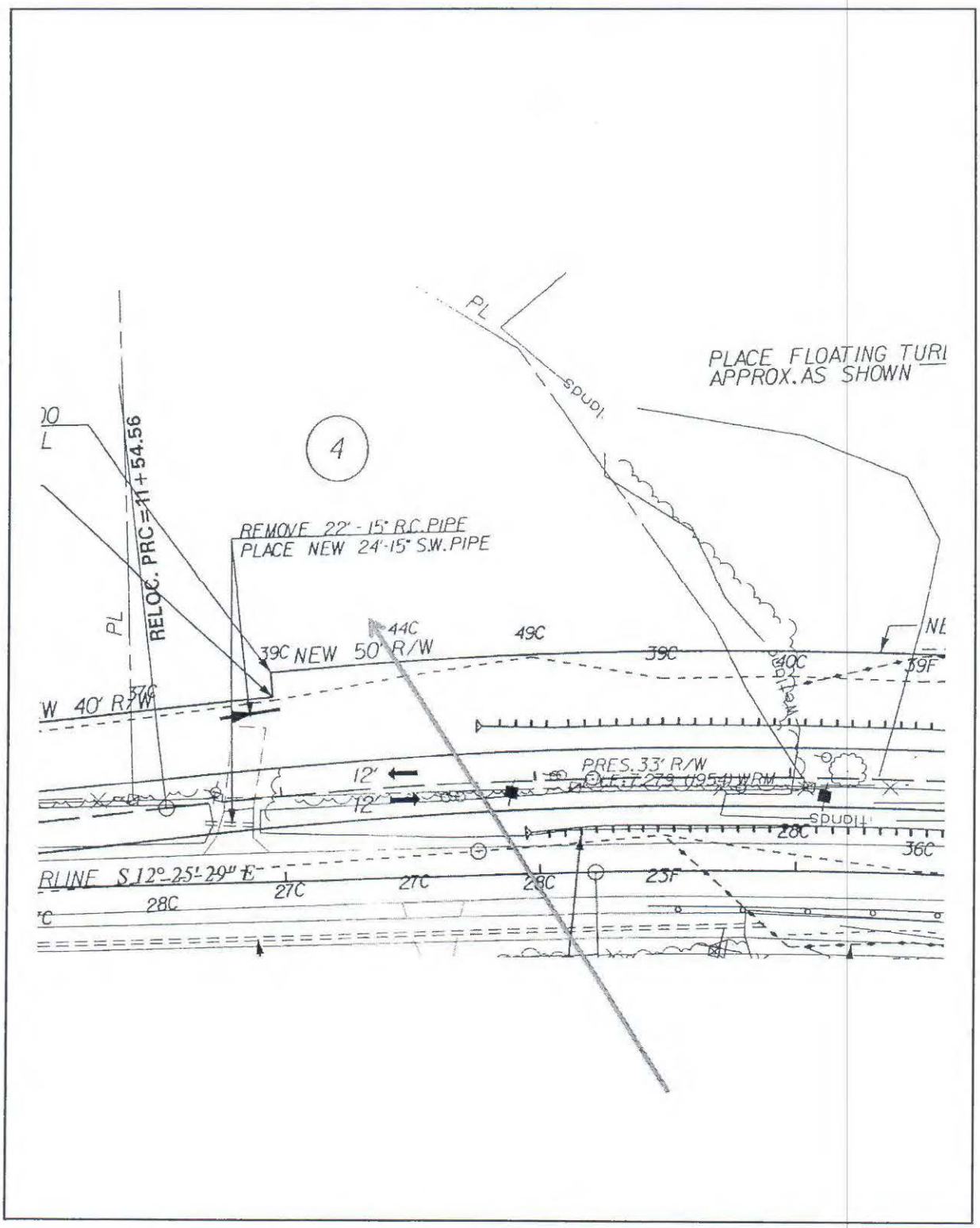
File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 4

SUBJECT PLAT\SKETCH



File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 4

SUBJECT PLAN SHEET



File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 4

PARAGRAPH 19. SCOPE OF WORK:

The subject is an undeveloped property located with frontage on Spanish Wells Road and the marshes of Jarvis Creek. It is located within the town limits of Hilton Head Island, Beaufort County, South Carolina.

.285 acres, or 12,416 square feet, is being acquired across the front of the subject along Spanish Wells Road for the replacement of Jarvis Creek Bridge.

This appraisal arrives at an opinion as to the fair market value of the acquisition. The appraisal involves an inspection of the subject, a thorough research of market data including comparable unit sales, and prevailing asking prices and terms for similar properties. Trends in the market are analyzed that would impact the value of the property and a determination is made as to the Highest and Best Use of the property both before and after the acquisition. The appropriate valuation techniques based on market data and analysis in concert with the Highest and Best Use conclusion are applied.

The Sales Comparison Approach is used to arrive at an opinion of market value for the subject land before and after the acquisition. The Cost Approach is not performed because the subject is undeveloped. The Income Approach is not performed because it does not appear that the property is subject to a ground lease and the fee simple value is appraised.

The steps taken in completion of this assignment are outlined as follow:

Property Identification/History: The subject property is identified through the Beaufort County public records as well as the plans for the project and other information provided by the Right of Way Agent.

Property Inspection: Stuart M. Saunders, MAI, CCIM conducted an on-site inspection of the subject property on August 5, 2014. The only purpose in visiting the property is to identify the characteristics and factors that impact the property's value on the date of the visit for a Right of Way Acquisition, and should not be considered, understood or relied upon to achieve any other objective or purpose. Aerial photographs were also utilized in the inspection of the property.

Property Description: A description of the subject property has been based upon the on-site inspection, public records and plans for the project.

Zoning and Restrictions: The subject's zoning has been obtained from the Town of Hilton Head Island. The subject deed was also reviewed for the presence of private restrictions.

Cost Approach: The Cost Approach is not applicable to this assignment.

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Sales Comparison Approach: Sales of comparable properties were used to perform this approach to value. The appraiser conducted an on-site physical inspection of the sales when possible. The transfers were verified via public records and with the appraiser, broker, grantor, grantee or knowledgeable third party when possible.

Income Capitalization Approach: This approach to value is not applicable to the assignment.

Reconciliation: The indications of value before and after the acquisition are used to arrive at an opinion as to the difference in the market value of the subject caused by the acquisition of the right of way for the proposed construction of this project.

This narrative appraisal report is presented in a summary format. The report is completed in conformance with the Uniform Standards of Professional Appraisal Practice and with the Code of Ethics and the Standards of Professional Practice of the Appraisal Institute.

The conclusions have been reported in a SCDOT Standard format Appraisal Report in accordance with the Uniform Standards of Professional Appraisal Practice (USPAP). Plans were furnished to show the acquisition area for right of way and are assumed to be correct.

Adequate data was available to complete the analysis. The before value is subject to the extraordinary assumption that the new right of way acquisition does not exist and will not exist. The after value is subject to hypothetical condition recognizing the value of the subject as if new right of way acquisition has already existed.

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PARAGRAPH 20-A. DESCRIPTION OF REALTY (BEFORE):

SITE DESCRIPTION

Present Use	Undeveloped
Site Size	1.40 acres or 60,984 square feet. **The recorded plat indicates the subject has 1 acre; however, I have relied upon the project plans and ROW agent worksheet since it does not have a negative effect upon the value of the property.** It is recommended that a qualified surveyor inspect the subject for existing property lines and easements that are unable to be detected by the appraiser(s).
Curb and Gutters	None
Sidewalk	None
# of Lanes	There are two (2) travel lanes along Spanish Wells Road in front of the subject.
Traffic Level	The traffic flow in front of the subject appears to be light to moderate.
Traffic Control	None
Shape	Subject has an irregular shape.
Ingress/Egress	Subject has full access from Spanish Wells Road.
Access to the Improvements	N/A
Frontage	The subject has approximately 300 feet of road frontage. It also has frontage along the marshes of Jarvis Creek.
Grade at Road Level	Slightly below
Visibility/Exposure	Good

Topography	The subject is generally level and mostly wooded.
Drainage	Adequate
Flood Plain:	
Map Number	4502500008D
Date	September 29, 1986
Zone	A, high flood risk
Landscaping	None
Utilities	
Water	Present
Sewer	Present
Electricity	Present
Natural Gas	N/A
Telephone	Present

Zoning	
Designation	SMU, Stoney Mixed Use District

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Uses Allowed	This district is designed to encourage cooperation between property owners in developing their properties, provide connectivity between properties, and create more pedestrian oriented uses than traditional commercial development. A mix of residential, commercial, office, and some resort accommodations are permitted.
Easements/ Encroachments	Based upon my inspection and examination of the subject site, as well as my review of plats and deeds of the property, I did not detect adverse easements other than normal utility easements and rights of way. These are not believed to have a detrimental impact on property value. **It should be noted that I am not qualified to detect easements and encroachments and legal counsel should be retained if there are any indications of title defects.**
Environmental	I am unawareof potential environmental hazards on the property. Environmental aspects of the subject property are beyond my expertise. If necessary, I recommend a professional in environmental expertise be retained.
Comments	The plat shows BSL's of 10 feet, 20 feet and 40 feet.
Personal Property, FF&E, etc. (Included in the estimate of value)	N/A
Relocation Items (Not included in the estimate of value)	N/A

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PARAGRAPH 20-B. DESCRIPTION OF REALTY (BEFORE):

IMPROVEMENT DESCRIPTION

Business Name (if applicable)	N/A
Improvement Size (Stated in Units of Comparison)	N/A
Year Built	
Estimated Effective Age	N/A
Estimated Economic Life	N/A
Type/Quality of Construction	N/A
Additions/Renovations	N/A
Foundation	N/A
Exterior Walls/Windows	N/A
Roof	N/A
Special Features	N/A
Exterior Condition	Overall exterior condition is N/A.

Interior Walls/Ceilings	N/A
HVAC	N/A
Flooring Covering	N/A
Lighting	N/A
Plumbing	N/A
Interior Condition	Overall interior condition is N/A.

Site Improvements	N/A
Parking	N/A
Utility	The property appears to have N/A utility and amenities for the existing utilization.
Comments	N/A
Personal Property, FF&E, etc. (Included in the estimate of value)	N/A
Relocation Items (Not included in the estimate of value)	N/A

PARAGRAPH 21. HIGHEST AND BEST USE (BEFORE):

Highest and Best Use is defined in The Appraisal of Real Estate – 13th Edition as, "The reasonably probable and legal use of vacant land or an improved property, that is physically possible, legally permissible, appropriately supported, financially feasible, and that results in the highest value."

AS VACANT:

Physically Possible:

The subject site has an irregular shape and contains 1.40 acres, or 60,984 square feet. It has approximately 300 feet of frontage along Spanish Wells Road as well as good frontage along the marshes of Jarvis Creek. It is generally level and wooded with good visibility and full access from the road. All necessary public and private utilities are available for development of the site.

Legally Permissible:

The subject is zoned SMU, or Stoney Mixed Use District, by the Town of Hilton Head Island. This district permits a variety of uses.

Financially Feasible/Maximally Productive:

Residential, preservation and speculation are all financially feasible and maximally productive for the subject parcel.

Therefore, based on the preceding discussion my opinion of the highest and best use of the property, as vacant and available for development, is for residential, preservation and speculative utilization.

AS IMPROVED:

Physically Possible:
N/A

Legally Permissible:
N/A

Financially Feasible/Maximally Productive:

N/A
Therefore, based on the preceding discussion my opinion of the highest and best use of the subject property, as improved, is for N/A

PARAGRAPH 22. VALUATION BEFORE THE ACQUISITION:

Land value is derived separately using the sales comparison approach and a minimum of three comparable sales. The South Carolina Department of Transportation requires that the Sales Comparison Approach be demonstrated for all improved properties unless unusual circumstances preclude its development or the improvements are determined to be unaffected by the acquisition. The Cost Approach shall be considered when the impacted improvements are less than ten years old, a special-use property, or when sufficient comparable sale or lease information is not available. The SCDOT requires application of the Income Approach on all investment and income-producing properties where existing improvements might be impacted by the project.

PARAGRAPH 22-A. SALES COMPARISON APPROACH TO VALUE (BEFORE)

The Sales Comparison Approach uses four (4) comparable land sales to appraise the subject land. The sales are charted and mapped along with comparable sales sheets in the Sales Brochure.

An adjustment grid is provided within the following pages, and the sales are given adjustments for location, size, shape and marsh/view. The sales price per square foot of effective land area is the chosen unit of comparison. The sales are discussed below.

Land Sale 7 is 15,682 square foot residential lot located in Palmetto Hall. It transferred for $86,150, or $5.49 per square foot, on January 21, 2014. The rear of this lot is adjacent to a lagoon, which in turn is adjacent to the golf course. A downward adjustment of 15% is given to Sale 7 because its location at the end of cul-de-sac within a private community is considered superior to the subject property. It is also given a downward adjustment of 15% for size since smaller sized properties typically sell for more on a per unit basis than larger properties, all other elements of comparison being equal. Land Sale 7 brackets the upper end of the range with an adjusted price per square foot of $3.84.

Land Sale 10 is a residential lot with 25,281 square feet that sold on March 13, 2014 for $78,000, or $3.09 square foot. The rear of the lot is adjacent with Dillon Road while the southwest and southeast property lines are adjacent to a golf course and cart path. Land Sale 10 is not given an adjustment for location because the rear of the lot backs to Dillon Road and the front is adjacent to a golf cart path. It is given downward adjustments of 15% for superior size and shape, in comparison to the subject. Land Sale 10 establishes the lower end of the range with an adjusted price of $2.62 per square foot, after an upward adjustment of 15% is given for lack of marsh view.

Land Sale 11 with 21,780 square feet is located along the marshes of Jarvis Creek at the end of Kirby Lane. It transferred on July 14, 2014 for $70,000, or $3.21 per square foot. An upward adjustment of 15% is applied for the inferior location of this parcel at the end of dirt lane. Land Sale 11 reflects an adjusted price of $2.73 per square foot after downward adjustments of 15% are given for smaller size and superior shape, in comparison to the subject.

Land Sale 12 is located at 152 Dillon Road and has 57,935 square feet of highlands. It transferred on June 3, 2014 for $165,000, or $2.85 per square foot. This property compares well to the subject and is not given any adjustments.

SALES COMPARISON APPROACH (BEFORE) CONCLUSION:

The adjusted prices range from $2.62 to $3.84 per square foot. Sale 12 compares the best to the subject and is weighted the most in arriving at an opinion of value toward the middle of the range.

The indicated market value of the subject is shown as follows:

60,984 S.F.	**X**	$ 2.85 per square foot	=	$ 173,804
	X	$ per unit	=	$
Rounded to:	**$ 173,805**			

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TRACT 4				
Comparable Sale	7	10	11	12
Sale Date	Jan-14	Mar-14	Jul-14	Jun-14
Size (SF)	15,682	25,281	21,780	57,935
Price / SF	$5.49	$3.09	$3.21	$2.85
Adjustments				
Property Rights	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Financing Terms	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Conditions of Sale	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Market Conditions	0.00%	0.00%	0.00%	0.00%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Location / Exposure	-15%	0%	15%	0%
Frontage / Access	0%	0%	0%	0%
Size	-15%	-15%	-15%	0%
Shape	0%	-15%	-15%	0%
Topography	0%	0%	0%	0%
Utilities	0%	0%	0%	0%
Marsh/View	0%	15%	0%	0%
Easements	0%	0%	0%	0%
Sub-Total Adjustments	-30%	-15%	-15%	0%
Adjusted Price	$3.84	$2.62	$2.73	$2.85

PARAGRAPH 22-B. COST APPROACH TO VALUE (BEFORE):

N/A

PARAGRAPH 22-C INCOME CAPITALIZATION APPROACH TO VALUE (BEFORE)

N/A

PARAGRAPH 23. RESOLUTION OF BEFORE VALUE AND VALUE ESTIMATE:

Sales Comparison Approach - There were several recent sales of comparable properties, and this approach provides a reliable indication of value for the subject property of $173,805.

Cost Approach - N/A

Income Approach - N/A

Therefore, based on the information contained in this report, the market value of the subject property as of the date of this report is estimated to be $173,805.

PARAGRAPH 24. DESCRIPTION OF THE ACQUISITION:

Land

There is .285 acres, 12,416 square feet, of permanent right of way being purchased along the subject's frontage with Spanish Wells Road. The area of acquisition has an irregular shape, is generally level and partially wooded. It has a depth of 35 feet to 53 feet.

Improvements

The acquisition is undeveloped.

PARAGRAPH 25. DESCRIPTION OF THE REMAINDER:

The Department of Transportation is relocating Spanish Wells Road in front of the subject in order to accommodate the new bridge being constructed over Jarvis Creek. Spanish Wells Road will still have two (2) lanes, and except for its reduction in size to 48,568 square feet, the subject is essentially unaffected by the acquisition. The subject will still have the general road grade with full access and good visibility from the road.

A portion of the subject's frontage along Spanish Wells will have a guardrail; however, it is my opinion that there are no damages or benefits to the remainder.

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PARAGRAPH 26. HIGHEST AND BEST USE (AFTER):

AS VACANT:

The highest and best use of the site is the same as in the before situation.

Therefore, based on that preceding discussion, my opinion of the highest and best use of the subject property, as vacant and available for development, after the proposed road construction is for residential, preservation, or speculative purposes.

AS IMPROVED:

N/A

PARAGRAPH 27. VALUE AFTER THE ACQUISITION:

"After" values and conclusions are based upon plans provided by the SCDOT and the completion of the proposed road construction.

Consideration has been given to relevant aspects of the property affected by the acquisition for analysis and comparison to the subject's "before" condition and the comparable data.

PARAGRAPH 27-A. SALES COMPARISON APPROACH TO VALUE (AFTER):

EXPLANATION OF ADJUSTMENTS:

The price per square foot value of the remainder is the same as before the acquisition.

VALUATION (AFTER) CONCLUSION:

The value of the subject in the after situation is shown as follows:

48,568 S.F.	X	$ 2.85 per S.F.	=	$ 138,419
	X	$ per unit	=	$
Rounded to:	**$ 138,420**			

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PARAGRAPH 27-B. COST APPROACH TO VALUE (AFTER):

N/A

PARAGRAPH 27-C. INCOME CAPITALIZATION APPROACH TO VALUE (AFTER)

N/A

PARAGRAPH 28. RESOLUTION OF AFTER VALUE AND VALUE ESTIMATE:

Sales Comparison Approach - The appraised value of the subject after the acqusition is well supported at $138,420.

Cost Approach - N/A

Income Approach - N/A

The Sales Comparison Approach would be relied upon by a potential purchaser. There was an ample supply of comparable sales, and the indication of value by this approach is well supported.

Therefore, based on the information contained in this report, the market value of the subject property after the acquisition is estimated to be $138,420.

PARAGRAPH 29. UNECONOMIC REMAINDER:

UNECONOMIC REMNANT – A parcel of real property in which the owner is left with an interest after the partial acquisition of the owner's property, and which the acquiring agency has determined has little or no value or utility to the owner.
NOTE: An uneconomic remnant may have substantial "market" value and still have little or no value or utility to the owner. *(Appraisal Guide; Federal Highway Administration).*

The subject has good utility to the owner and is not considered to be an uneconomic remainder.

N/A

Remainder Size	X	$ per unit	X	Residual Value %	=	$	
Rounded to:				**$**			

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DISTRIBUTION OF VALUES

(30)	Value Components:	Before (Paragraph 22)	After (Paragraph 27)	Difference
	Land Value:	$173,805	$138,420	$35,385
	Building Value:	$0	$0	$0
	Site Improvements:	$0	$0	$0
	TOTAL:	**$173,805**	**$138,420**	**$35,385**

(31)	Value Components of the Acquisition:					
	Right of Way Acquired: 12,416 sf of permanent right of way					
	Land:	12,416.00	acres/sf @:	$2.85		**$35,386**
	Value of Buildings within the Acquisition Area:					$0
	Value of Site Improvements within the Acquisition Area:					$0
	Total for the Acquisition:					**$35,385**
	plus Damages (if any to the remainder)					$0
	less Benefits (if any to the remainder)					$0
	Total for the Acquisition (Right of way, plus damages, less benefits):					**$35,385**

(32)	Final Statement of Value:		
	a)	Having considered all applicable approaches, it is my opinion that the indicated value of the whole property before the acquisition is:	**$173,805**
	b)	Having considered all applicable approaches, it is my opinion that the indicated value of the whole property after the acquisition is:	**$138,420**
	c)	The difference between the indicated value of the property before the acquisition, and the indicated value of the remainder, after the acquisition is:	**$35,385**

(33) Based on this report, the fair market rental for this property is: **N/A** per month.

(Indicate monthly rental if building improvement is located within the new right of way or it the current occupant will be displaced as a result of the acquisition.

The appraisal is made as of: 5-Aug-14

Date of Appraisal 14-Aug-14

Stuart M Saunders

Stuart M. Saunders, MAI, CCIM
S.C. Certified General Real Estate Appraiser
CG 1405

S.C. Real Estate Appraiser

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 4

GENERAL ASSUMPTIONS AND LIMITING CONDITIONS

General Assumptions - This appraisal has been completed and the appraisal report prepared with the following **general assumptions**:

1. No responsibility is assumed for the legal description or for matters including legal or title considerations. The titles to the property are assumed to be good and marketable unless otherwise stated. Any plats, maps, or photographs in this appraisal are used merely to help the reader visualize the property and its surroundings and are not certified to be accurate.
2. Any liens or encumbrances (except for any lease encumbrance that might be referred to in the appraisal) which may exist have been disregarded, and the property has been appraised as though no delinquency in the payment of general taxes or special assessment exists and as though free of indebtedness.
3. It is assumed that the utilization of the land and improvements are within the boundaries of the lines of the property described and that there is no encroachment or trespass unless noted in the report. No survey of the subject property was made or caused to be made by us, and no responsibility is assumed for the occurrence of such matters.
4. A visual inspection of the subject site was made and all engineering is assumed to be correct. The plot plan and illustrative materials in this report are included only to assist the reader in visualizing the property and to show the reader the relationship of its boundaries. The appraiser is not a construction engineer and is not responsible for structural or cosmetic inadequacies associated with any of the improvements unless otherwise noted in the report.
5. It is assumed that there are no hidden or unapparent conditions of the property, subsoil, or structures that render it more or less valuable. No responsibility is assumed for such conditions or for arranging for engineering studies that may be required to discover them. The soil for the area under appraisal appears to be firm and solid, unless otherwise stated. Subsidence in the area is unknown or uncommon, and the appraiser(s) does not warrant against this condition or occurrence.
6. Subsurface rights (minerals and oil) were not considered in this appraisal unless otherwise stated. In addition, no potential timber value was considered.

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General Assumptions Continued

7. It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless noncompliance is stated, defined, and considered in the appraisal report. Unless otherwise stated in this report, the appraiser did not observe the existence of hazardous materials or gases, which may or may not be present on the property. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or other potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there are no such materials on or in the property, which would cause a loss in value. No responsibility is assumed for any such conditions or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired.
8. It is assumed that all applicable zoning and use regulations and restrictions have been complied with, unless a nonconforming use has been stated, defined, and considered in the appraisal report.
9. It is assumed that all required licenses, certifications of occupancy, consents, or other legislative or administrative authority from any local, state, or national government or private entity or organization have been or can be obtained or renewed for any use on which the value estimate contained in this report is based.
10. This appraisal assumes water and sewer services will always be provided for the subject.
11. Responsible ownership and competent property management are assumed.
12. The Americans with Disabilities Act ("ADA") became effective January 26, 1992. I (we) have not made a specific compliance survey and an analysis of this property to determine whether or not it is in conformity with the various detailed requirements of the ADA. It is possible that a compliance survey of the property, together with a detailed analysis of the requirements of the ADA, could reveal that the property is not in compliance with one or more of the requirements of the Act. If so, this fact could have a negative impact on the value of the property. Since I (we) have no direct evidence relating to this issue, I (we) did not consider

General Assumptions Continued

non-compliance with the requirements of ADA in estimating the value of the property.

13. There is currently a good deal of discussion regarding the potential hazards of Electro-Magnetic Fields and the possible health risk of being located near high voltage transmission lines. I (we) have not made a specific compliance survey and analysis of this property to determine whether or not there are potentially hazardous effects from EMF's. It is possible that a compliance survey of the property together with a detailed analysis could reveal that there is EMF levels, which are above a safe level. If so, this fact could have a negative impact on the value of the subject property. Since I (we) have no direct evidence relating to this issue, I (we) did no consider EMF levels in estimating the value for the property.

General Limiting Conditions – This appraisal has been completed and the appraisal report has been prepared with the following **general limiting conditions**.

1. The distribution, if any, of the total valuation in this report between land and improvements applies only under the stated program of utilization. The separate allocations for land and buildings must not be used in conjunction with any other appraisal and are invalid if so used. The value estimates provided in the report apply to the entire property, and any proration or division of the total into fractional interests will invalidate the value estimate, unless such proration or division or interests has been set forth in this report.
2. Neither possession of this appraisal or copy thereof carries with it the right to publication, nor may it be used for any purpose by anyone but the applicant without previous consent of the appraiser(s).
3. The appraiser, by reason of this appraisal, is not required to give further consultation, testimony, or be in attendance in court with reference to the property in question unless arrangements have been previously made.
4. Neither all no part of the contents of this report (especially as to value, the identity of the appraiser, or the firm with which the appraiser is associated) shall be disseminated to the public through advertising, public relations, news, sales, or other media without the prior written consent and approval of the appraiser.

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General Limiting Conditions Continued

5. Information, estimates, and opinions contained in this report are obtained from sources considered reliable, however the appraiser assumes no liability for such sources.
6. The information supplied to the appraiser is considered to be accurate. The information supplied by the client has been accepted without further verification as correctly reflecting the property's current condition unless otherwise noted.
7. The various estimates of value presented in this report apply to this appraisal only and may not be used out of the context presented herein. This appraisal is valid only for the appraisal date or dates specified herein and only for the appraisal purpose specified herein.
8. **The intended user and only user of this report is the South Carolina Department of Transportation for the intended use to assist them in an eminent domain acquisition**.
9. My analysis, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
10. The analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics and the Uniform Standards of Professional Appraisal Practice of The Appraisal Institute.
11. The reported analysis, opinions and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analysis, opinions, and conclusions.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 4

CERTIFICATE OF APPRAISER

I Hereby certify:

That I have personally inspected the property herein and that I have also made a personal field inspection of the comparable sales relied upon in making this appraisal. The subject and the comparable sales relied upon in making the appraisal were as represented in the comparable data brochure which supplements this appraisal.

That to the best of my knowledge and belief the statements contained in the appraisal herein set forth are true, and information upon which the opinions expressed therein are based is correct: subject to the limiting conditions therein set forth.

That I understand that such appraisal may be used in connection with acquisition of right of way for a highway to be constructed by the State of South Carolina with the assistance of Federal-aid highway funds, or other Federal Funds.

That such appraisal has been made in conformity with the appropriate State and Federal laws regulations, policies and procedures applicable to that appraisal of right of way for such purposes; and that to the best of my knowledge, no portion of the value assigned to such property consists of items, which are non-compensable under the established law of South Carolina.

That neither my employment nor my compensation for preparing this appraisal report is in any way contingent upon the values reported herein.

That I have no direct or indirect present or contemplated future personal interest in such property or in any benefit from the acquisition of such property appraised.

That I have not revealed the findings and results of such appraisal to anyone other than the proper officials of the South Carolina Department of Transportation or officials of the Federal Highway Administration and I will not do so until so authorized by the State officials or until I am required to do so by due process of law, or until I am released from this obligation by having publicly testified as to such findings.

That the owner or his designated representative was given the opportunity to accompany me during my inspection of the property.

That I have not provided any services regarding the subject property within the prior three years, as an appraiser or in any other capacity.

That any decrease or increase in the fair market value of the real property prior to the date of valuation caused by the public improvement for which such property is being acquired, or by the likelihood that the property would be acquired for such improvement, other than that due to the physical deterioration with in the reasonable control of the owner, has been disregarded in determining the compensation for the property.

That my opinion of the fair market value of the acquisition as of August 5, 2014 is **$35,385** based upon my independent appraisal and the exercise of my professional judgment.

As of the date of this report, I have completed the requirements for continuing education as set forth by the Uniform Standards of Professional Appraisal Practice and The Appraisal Institute.

Stuart M Saunders

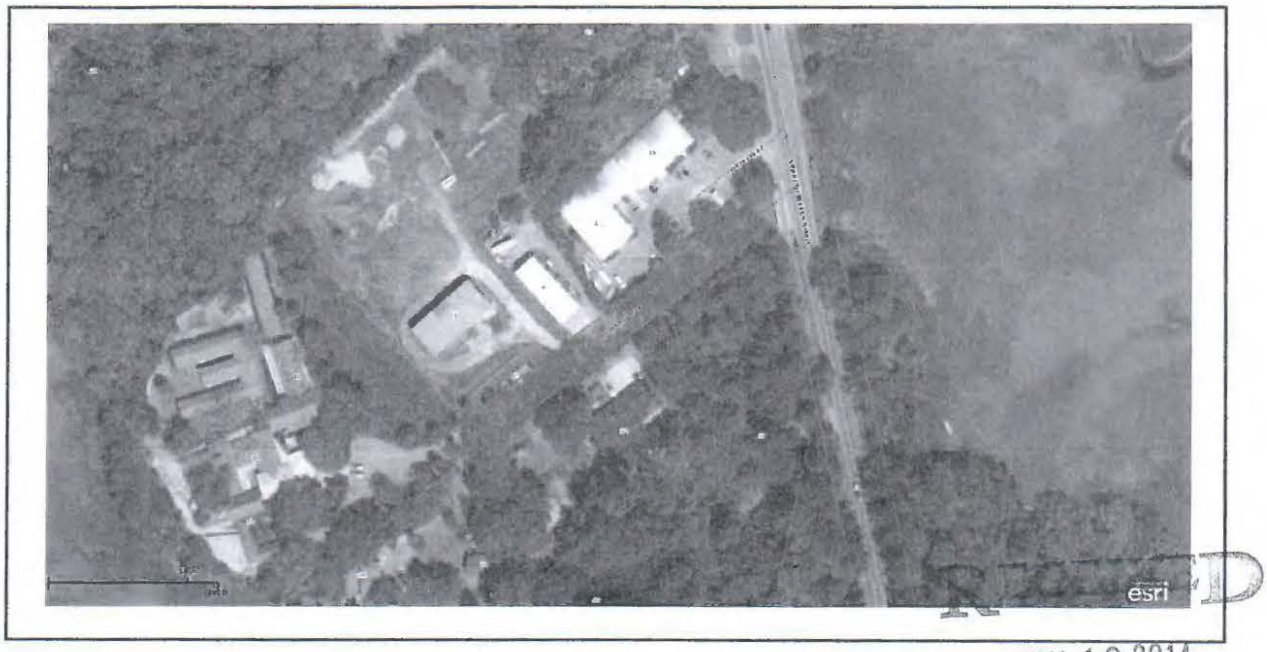
Date: **August 14, 2014**

Stuart M. Saunders, MAI, CCIM
Inspecting Appraiser
State Certified General Real Estate Appraiser
#CG 1405

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

SUMMARY APPRAISAL REPORT

(1) Tract Location: Humane Way ROW, Hilton Head Island, S.C.
Property Owner: Town of Hilton Head Island
Address: 1 Town Center Court, Hilton Head Island, S.C. 29928



Front View of Subject Property

PREPARED FOR:
South Carolina Department of Transportation

(2) Prior to inspection the owner was contacted by telephone and invited to be present during inspection of this property. The tract was inspected on October 30, 2014 and I was accompanied by nobody.
Required by Sec. 102 (c) 1 of Uniform Act.
Explain: (Why not accompanied, relation of representative, items discussed, etc.)

The attorney for the Town of Hilton Head Island, Mr. Mitch Thorsen, gave me permission to inspect the property alone.

PREPARED BY:

(3) Inspecting Appraiser: Stuart M. Saunders, MAI, CCIM
S.C. State Certified General R/E Appraiser #: CG 1405
Contributing Appraiser (if applicable): N/A

Firm Name: Saunders & Assoicates, Inc.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

Sales Comparison Approach: Sales of comparable properties were used to perform this approach to value. The sales were inspected in the field when possible. The transfers were verified via public records and with the appraiser, broker, grantor, grantee or knowledgeable third party when possible.

Income Capitalization Approach: This approach to value was not applicable to the assignment.

Reconciliation: The indications of value are used to arrive at an opinion as to the difference in the market value of the subject caused by the acquisition of the right of way for the proposed construction of this project.

The conclusions of the appraisal have been reported in a SCDOT nominal format Appraisal Report. The report has been completed in conformance with the Uniform Standards of Professional Appraisal Practice (USPAP) and with the Code of Ethics and the Standards of Professional Practice of the Appraisal Institute. Plans were furnished to show the acquisition area for right of way and are assumed to be correct.

Adequate data was available to complete the analysis. The before value is subject to the extraordinary assumption that the new right of way acquisition does not exist and will not exist. The after value is subject to hypothetical condition recognizing the value of the subject as if new right of way acquisition has already existed.

(13) Description of Property Before and After the Acquisition:

Utilities: Electricity ☒, Gas ☒, Well ☐, Public Water ☒, Septic Tank ☐, Public Sewer ☒, Other ☐

DESCRIPTION	BEFORE	AFTER
Present Use:	Road Right of Way (Describe if "Other")	Same (Describe if "Other")
Site Size:	.38	.373
Acquisition Size:	.007 acre or 305 square feet	
Zoning:	New - Stoney District	Same
Zoning Conformity:	Legal Conforming	Legal Conforming
Corner Influence:	NO CORNER	NO CORNER
Primary Frontage (Linear Feet):	45' +/- Spanish Wells Road	Same
Secondary Frontage(s) (Linear Feet):	N/A	N/A
Visibility:	TYPICAL	SIMILAR
Ingress/Egress Primary Road: Secondary Road(s):	Full Access N/A	Full Access N/A
Grade at Road Level:	AT GRADE	AT GRADE
Shape:	REGULAR	REGULAR
Additional Comments: The subject has a rectangular shape with an average depth of approximately 365 feet. It is used as the road right of way for Humane Way. The plans call this Humane Lane, but the public records and street sign have Humane Way. Site improvements include asphalt paving, grass and a street sign.		

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(14) Highest and Best Use Before and After the Acquisition:

The subject property is zoned Stoney District (S) by the Town of Hilton Head Island. This district allows residential, special purpose and some commercial uses. The subject appears to be a legal conforming use.

The subject is too narrow to develop as a stand-alone parcel, and the highest and best use of the subject property both before and after the acquisition is for assemblage, preservation or speculation.

(15) Description of the Area Acquired:

Land

The acquisition has a rectangular shape and contains .007 of an acre, or 305 square feet. It is generally level and clear and crosses the subject's frontage with Spanish Wells Road.

Site Improvements

There is about 175 square feet of asphalt paving in the acquisition as well as some grass.

Moving Items

The street sign is a moving item.

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(16) Valuation Analysis:

A: Land Valuation- Sales Comparison Approach

TRACT 43				
Comparable Sale	7	10	11	12
Sale Date	Jan-14	Mar-14	Jul-14	Jun-14
Size (SF)	15,682	25,281	21,780	57,935
Price / SF	$5.49	$3.09	$3.21	$2.85
Adjustments				
Property Rights	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Financing Terms	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Conditions of Sale	0%	0%	0%	0%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Market Conditions	0.00%	0.00%	0.00%	0.00%
Sub-Total	$5.49	$3.09	$3.21	$2.85
Location / Exposure	-15%	0%	0%	0%
Frontage / Access	0%	0%	0%	0%
Size	0%	0%	0%	15%
Assemblage/shape	-50%	-50%	-50%	-50%
Topograpby	0%	0%	0%	0%
Utilities	0%	0%	0%	0%
Marsh/View	0%	0%	0%	0%
Easements	0%	0%	0%	0%
Sub-Total Adjustments	-65%	-50%	-50%	-35%
Adjusted Price	$1.92	$1.54	$1.61	$1.85

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

Support for Assemblage Adjustment

Matched Pair Analysis Sale 2A and Sale 1A

Sale 2A		Sale 1A	
Walgreens Site		Uneconomic Remainder	
Summerville, SC		Summerville, SC	
Sale Date	01/23/04	Sale Date	11/02/07
Sale Price/SF	$25.35	Sale Price/SF	**$4.43**
Market Conditions	N/A	Market Conditions	N/A
Adj Sale Price/SF	**$25.35**	Adj Sale Price/SF	**$4.43**
Difference in value attributable to ASSEMBLAGE			**-82.52%**

Matched Pair Analysis Sale 4A and Sale 3A

Sale 4A		Sale 3A	
Chuck Dawley & Melvin Bennett Road		Chuck Dawley & Melvin Bennett Road	
Mount Pleasant, SC		Mount Pleasant, SC	
Sale Date	01/11/00	Sale Date	06/14/99
Sale Price/SF	$2.78	Sale Price/SF	$5.29
Market Conditions	N/A	Market Conditions	6%
Adj Sale Price/SF	**$2.78**	Adj Sale Price/SF	**$5.61**
Difference in value attributable to ASSEMBLAGE			**-50.45%**

Matched Pair Analysis Sale 7A and Sale 8A

Sale 7A		Sale 8A	
Morrison Drive		Meeting & Hunger Streets	
Charleston, SC		Charleston, SC	
Sale Date	06/05/07	Sale Date	10/16/07
Sale Price/SF	$11.39	Sale Price/SF	$56.69
Market Conditions	1.0835%	Market Conditions	N/A
Adj Sale Price/SF	**$12.34**	Adj Sale Price/SF	**$56.69**
Difference in value attributable to ASSEMBLAGE			**-78.23%**

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

Support for Assemblage Adjustment

Matched Pair Analysis Sale 6A and Sale 5A

Sale 6A		Sale 5A	
Atomic Road		Atomic Road	
Aiken, SC		Aiken, SC	
Sale Date	11/24/03	Sale Date	06/15/04
Sale Price/SF	$0.23	Sale Price/SF	$1.02
Market Conditions	4%	Market Conditions	N/A
Location	15%	Location	N/A
Adj Sale Price/SF	**$0.28**	Adj Sale Price/SF	**$1.02**
Difference in value attributable to ASSEMBLAGE			**-73.03%**

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Explanation and Support of Adjustments:

The Sales Comparison Approach uses four (4) comparable land sales to appraise the subject land. The sales are charted and mapped along with comparable sales sheets in the Sales Brochure.

The sales are zoned for residential and multi-family use, which I believe is appropriate for this assignment. Though the subject is adjacent to residential, office warehouse, special purpose and preservation properties, there has been no recent commercial development in the area. Furthermore, the subject is located at the start of a residential area and properties that were purchased for preservation purposes.

An adjustment grid is provided within the following pages, and the sales are given adjustments for location, size and assemblage/shape. The sales price per square foot of effective land area is the chosen unit of comparison. The sales are discussed below.

Land Sale 7 is 15,682 square foot residential lot located in Palmetto Hall. It transferred for $86,150, or $5.49 per square foot, on January 21, 2014. The rear of this lot is adjacent to a lagoon, which in turn is adjacent to the golf course. A downward adjustment of 15% is given to Sale 7 because its location at the end of cul-de-sac within a private community is considered superior to the subject property. A downward adjustment for assemblage/shape of 50% was supported on the previous pages. Land Sale 7 has an adjusted price per square foot of $1.92.

Land Sale 10 is a residential lot with 25,281 square feet that sold on March 13, 2014 for $78,000, or $3.09 square foot. The rear of the lot is adjacent with Dillon Road while the southwest and southeast property lines are adjacent to a golf course and cart path. Land Sale 10 is not given an adjustment for location because the rear of the lot backs to Dillon Road and the front is adjacent to a golf cart path. It is given a downward adjustment of 50% for assemblage/shape and has an adjusted price per square foot of $1.54.

Land Sale 11 with 21,780 square feet is located along the marshes of Jarvis Creek at the end of Kirby Lane. It transferred on July 14, 2014 for $70,000, or $3.21 per square foot. It has an adjusted price per square foot of $1.61, after assemblage/shape is considered.

Land Sale 12 is located at 152 Dillon Road and has 57,935 square feet of highlands. It transferred on June 3, 2014 for $165,000, or $2.85 per square foot. This property reflects an adjusted price per square foot of $1.85 after size and shape are considered.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

SALES COMPARISON APPROACH (BEFORE) CONCLUSION:

The adjusted prices range from $1.54 to $1.92 per square foot. All the sales are considered in arriving at an opinion of value toward the middle of the range at $1.75 per square foot.

B: Valuation of Improvements in Area Acquired

Description of Site Improvements:
There is about 175 square feet of asphalt paving in the acquistion as well as minimal landscaping items such grass.

Explanation and Support of Value Estimate:
The replacement cost new for the aspalt paving is based upon cost information contained within my office files and reference to the Marshall & Swift Cost Handbook. The contributing value of the asphalt paving is estimated below at $670.

175 S.F. x $4.50/S.F. x 85% = $670

The contributing value of the landscaping items within the acquisition is estimated at $100.

(17) Uneconomic Remainder or Remnant:

UNECONOMIC REMNANT – A parcel of real property in which the owner is left with an interest after the partial acquisition of the owner's property, and which the acquiring agency has determined has little or no value or utility to the owner.

NOTE: An uneconomic remnant may have substantial "market" value and still have little or no value or utility to the owner. *(Appraisal Guide, Federal Highway Administration).*

There is not an uneconomic remainder.

N/A

Remainder Size	X	$ per unit	X	Residual Value %	$
Rounded to:				$	

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

ALLOCATION OF VALUE

(18)	**Estimated Value of the Acquisition:**					
	Land Acquired:	305.00	S.F.	X Unit Value:	$1.75	**Value Summary**
	Value of Land Acquired:					$534
	Value of Temporary Right of Way:					
	Value of Site Improvements:					770
	Damages/Cost to Cure:					
	Total:					**$1,304**

Therefore it is the appraiser's opinion that the Fair Market Value of the Acquisition is: **$1,305**
as of: **10/30/14**

Date of the Report: November 9, 2014

Stuart M. Saunders

Stuart M. Saunders, MAI, CCIM
S.C. Certified General Real Estate Appraiser
CG 1450

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

GENERAL ASSUMPTIONS AND LIMITING CONDITIONS

General Assumptions - This appraisal has been completed and the appraisal report prepared with the following **general assumptions**:

1. No responsibility is assumed for the legal description or for matters including legal or title considerations. The titles to the property are assumed to be good and marketable unless otherwise stated. Any plats, maps, or photographs in this appraisal are used merely to help the reader visualize the property and its surroundings and are not certified to be accurate.
2. Any liens or encumbrances (except for any lease encumbrance that might be referred to in the appraisal) which may exist have been disregarded, and the property has been appraised as though no delinquency in the payment of general taxes or special assessment exists and as though free of indebtedness.
3. It is assumed that the utilization of the land and improvements are within the boundaries of the lines of the property described and that there is no encroachment or trespass unless noted in the report. No survey of the subject property was made or caused to be made by us, and no responsibility is assumed for the occurrence of such matters.
4. A visual inspection of the subject site was made and all engineering is assumed to be correct. The plot plan and illustrative materials in this report are included only to assist the reader in visualizing the property and to show the reader the relationship of its boundaries. The appraiser is not a construction engineer and is not responsible for structural or cosmetic inadequacies associated with any of the improvements unless otherwise noted in the report.
5. It is assumed that there are no hidden or unapparent conditions of the property, subsoil, or structures that render it more or less valuable. No responsibility is assumed for such conditions or for arranging for engineering studies that may be required to discover them. The soil for the area under appraisal appears to be firm and solid, unless otherwise stated. Subsidence in the area is unknown or uncommon, and the appraiser(s) does not warrant against this condition or occurrence.
6. Subsurface rights (minerals and oil) were not considered in this appraisal unless otherwise stated. In addition, no potential timber value was considered.

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General Assumptions Continued

7. It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless noncompliance is stated, defined, and considered in the appraisal report. Unless otherwise stated in this report, the appraiser did not observe the existence of hazardous materials or gases, which may or may not be present on the property. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or other potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there are no such materials on or in the property, which would cause a loss in value. No responsibility is assumed for any such conditions or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired.
8. It is assumed that all applicable zoning and use regulations and restrictions have been complied with, unless a nonconforming use has been stated, defined, and considered in the appraisal report.
9. It is assumed that all required licenses, certifications of occupancy, consents, or other legislative or administrative authority from any local, state, or national government or private entity or organization have been or can be obtained or renewed for any use on which the value estimate contained in this report is based.
10. This appraisal assumes water and sewer services will always be provided for the subject.
11. Responsible ownership and competent property management are assumed.
12. The Americans with Disabilities Act ("ADA") became effective January 26, 1992. I (we) have not made a specific compliance survey and an analysis of this property to determine whether or not it is in conformity with the various detailed requirements of the ADA. It is possible that a compliance survey of the property, together with a detailed analysis of the requirements of the ADA, could reveal that the property is not in compliance with one or more of the requirements of the Act. If so, this fact could have a negative impact on the value of the property. Since I (we) have no direct evidence relating to this issue, I (we) did not consider

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

General Assumptions Continued

non-compliance with the requirements of ADA in estimating the value of the property.

13. There is currently a good deal of discussion regarding the potential hazards of Electro-Magnetic Fields and the possible health risk of being located near high voltage transmission lines. I (we) have not made a specific compliance survey and analysis of this property to determine whether or not there are potentially hazardous effects from EMF's. It is possible that a compliance survey of the property together with a detailed analysis could reveal that there is EMF levels, which are above a safe level. If so, this fact could have a negative impact on the value of the subject property. Since I (we) have no direct evidence relating to this issue, I (we) did no consider EMF levels in estimating the value for the property.

General Limiting Conditions – This appraisal has been completed and the appraisal report has been prepared with the following **general limiting conditions**.

1. The distribution, if any, of the total valuation in this report between land and improvements applies only under the stated program of utilization. The separate allocations for land and buildings must not be used in conjunction with any other appraisal and are invalid if so used. The value estimates provided in the report apply to the entire property, and any proration or division of the total into fractional interests will invalidate the value estimate, unless such proration or division or interests has been set forth in this report.
2. Neither possession of this appraisal or copy thereof carries with it the right to publication, nor may it be used for any purpose by anyone but the applicant without previous consent of the appraiser(s).
3. The appraiser, by reason of this appraisal, is not required to give further consultation, testimony, or be in attendance in court with reference to the property in question unless arrangements have been previously made.
4. Neither all no part of the contents of this report (especially as to value, the identity of the appraiser, or the firm with which the appraiser is associated) shall be disseminated to the public through advertising, public relations, news, sales, or other media without the prior written consent and approval of the appraiser.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

General Limiting Conditions Continued

5. Information, estimates, and opinions contained in this report are obtained from sources considered reliable, however the appraiser assumes no liability for such sources.
6. The information supplied to the appraiser is considered to be accurate. The information supplied by the client has been accepted without further verification as correctly reflecting the property's current condition unless otherwise noted.
7. The various estimates of value presented in this report apply to this appraisal only and may not be used out of the context presented herein. This appraisal is valid only for the appraisal date or dates specified herein and only for the appraisal purpose specified herein.
8. **The intended user and only user of this report is the South Carolina Department of Transportation for the intended use to assist them in an eminent domain acquisition**.
9. My analysis, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
10. The analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics and the Uniform Standards of Professional Appraisal Practice of The Appraisal Institute.
11. The reported analysis, opinions and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analysis, opinions, and conclusions.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

CERTIFICATE OF APPRAISER

I Hereby certify:

That I have personally inspected the property herein and that I have also made a personal field inspection of the comparable sales relied upon in making this appraisal. The subject and the comparable sales relied upon in making the appraisal were as represented in the comparable data brochure which supplements this appraisal.

That to the best of my knowledge and belief the statements contained in the appraisal herein set forth are true, and information upon which the opinions expressed therein are based is correct: subject to the limiting conditions therein set forth.

That I understand that such appraisal may be used in connection with acquisition of right of way for a highway to be constructed by the State of South Carolina with the assistance of Federal-aid highway funds, or other Federal Funds.

That such appraisal has been made in conformity with the appropriate State and Federal laws regulations, policies and procedures applicable to that appraisal of right of way for such purposes; and that to the best of my knowledge, no portion of the value assigned to such property consists of items, which are non-compensable under the established law of South Carolina.

That neither my employment nor my compensation for preparing this appraisal report is in any way contingent upon the values reported herein.

That I have no direct or indirect present or contemplated future personal interest in such property or in any benefit from the acquisition of such property appraised.

That I have not revealed the findings and results of such appraisal to anyone other than the proper officials of the South Carolina Department of Transportation or officials of the Federal Highway Administration and I will not do so until so authorized by the State officials or until I am required to do so by due process of law, or until I am released from this obligation by having publicly testified as to such findings.

That the owner or his designated representative was given the opportunity to accompany me during my inspection of the property.

That I have not provided any services regarding the subject property within the prior three years, as an appraiser or in any other capacity.

That any decrease or increase in the fair market value of the real property prior to the date of valuation caused by the public improvement for which such property is being acquired, or by the likelihood that the property would be acquired for such improvement, other than that due to the physical deterioration with in the reasonable control of the owner, has been disregarded in determining the compensation for the property.

The reported analyses, opinions and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics and Standards of Professional Practice of the Appraisal Institute.

The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.

File #: 7.039102 **PIN #:** 39102 RD01 **Project #:** BR07(009) **Tract #:** 43

As of the date of this report, I have completed the continuing education program for Designated Members of the Appraisal Institute.

As of the date of this report, I have completed the requirements for continuing education as set forth by the Uniform Standards of Professional Appraisal Practice and with the Code of Ethics and Standards of Professional Practice of The Appraisal Institute.

That my opinion of the fair market value of the acquisition as of **October 30, 2014** is **$1,305** based upon my independent appraisal and the exercise of my professional judgment.

Stuart M. Saunders

Date: **November 9, 2014**

Stuart M. Saunders, MAI, CCIM
Inspecting Appraiser
State Certified General Real Estate Appraiser
#CG 1405

File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 43

APPRAISAL DETAILS AND REQUIREMENTS

(4) **PROPERTY RIGHTS APPRAISED:** Fee Simple

(5) **PURPOSE OF THE APPRAISAL:** To estimate the difference in the market value of this property caused by the acquisition of the right of way for the proposed construction of this project.

(6) **INTENDED USE:** To assist the South Carolina Department of Transportation in negotiations with the property owner concerning an eminent domain acquisition.

Market value is defined as "The most probable price, as of a specified date, in cash, or in terms equivalent to cash, or in other precisely revealed terms, for which the specified property rights should sell after reasonable exposure in a competitive market under all conditions requisite to a fair sale, with the buyer and seller each acting prudently, knowledgeably, and for self-interest, and assuming that neither is under undue duress.
SOURCE: The Appraisal Institute, The Dictionary of Real Estate Appraisal, 4th Edition

(7) **EXPOSURE TIME:** Up to approximately 18 months

(8) **FIVE-YEAR SALE HISTORY:**

Date	Sale Price	Deed Reference
05/17/07-S; 06/21/07-R	$47,500	2571/713
08/01/06-S; 08/04/06-R	$1.00	2418/2290
06/17/93-S; 11/17/94-R	$10 Quit Claim	736/1900
	$	
Comments: The most recent transfer includes the subject as well as another road right of way.		

(9) **CURRENT LISTING:** N/A **PENDING CONTRACT:** N/A

(10) **ASSESSMENT AND TAXES:**

Tax Parcel ID #: R511-007-000-1048-0000

Tax Year: 2013

Land Value: $ 500 Improvement Value: $ N/A Total Assessed Value: $ 30.00

Real Estate Taxes: $ N/A since owned by Town

(11) **CURRENT ZONING ANALYSIS:**

District: New Zone-Stoney District (S) Current Conformity: Legal Conforming

MININUM REQUIREMENTS:

Front Setback:	40 feet from minor arterial
Rear Setback:	N/A
Side Setback:	20 feet to 40 feet depending on use
Building Height:	35 feet to 45 feet depending on use
# Parking Spaces:	Varies according to use
Road Frontage:	Does not appear to be a minimum amount of road frontage
Maximum Building Size:	Varies

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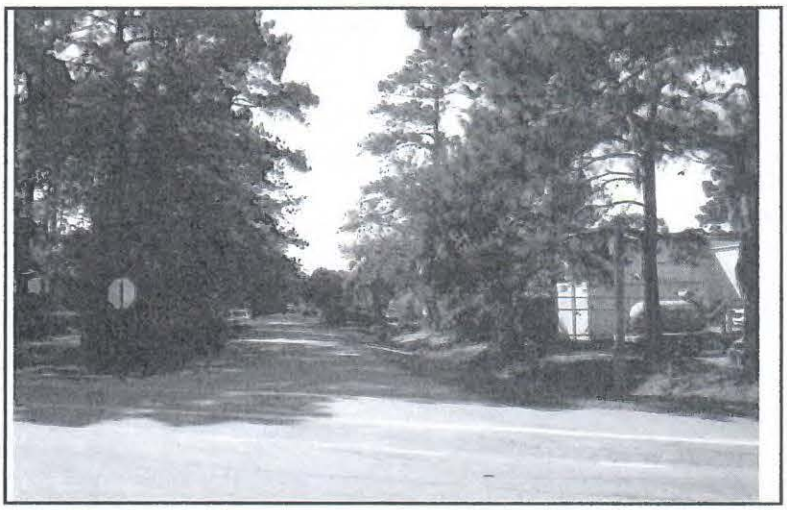
SUBJECT PHOTOGRAPHS (1-3)

Address/Location: Humane Way ROW, Hilton Head Island, Beaufort County, S.C.

Photos Taken By: Stuart M. Saunders, MAI, CCIM **Date of Photos:** October 30, 2014



1. Front view of subject property. Photograph taken from across Spanish Wells Road.

2. Easterly view across acquisition.

3. Westerly view across acquisition.

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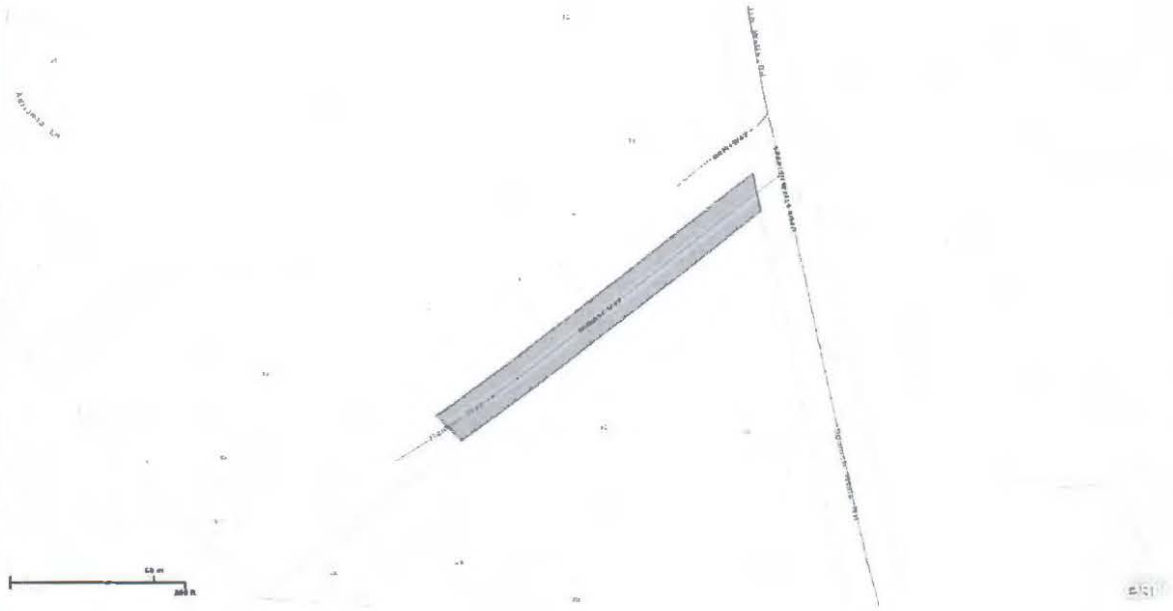
SUBJECT TAX MAP



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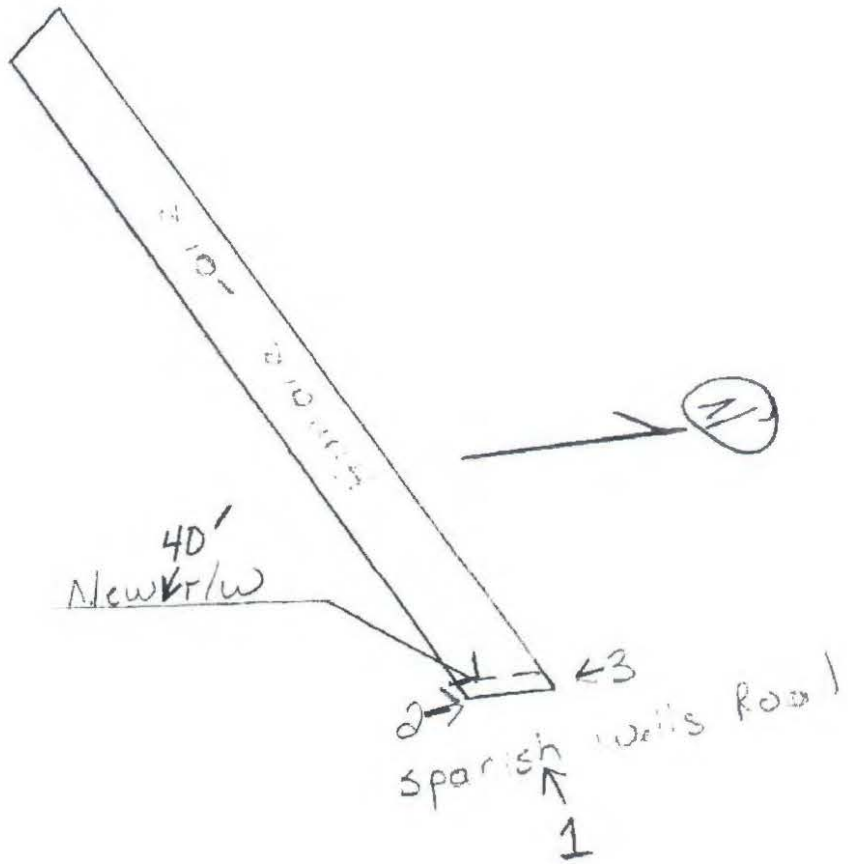
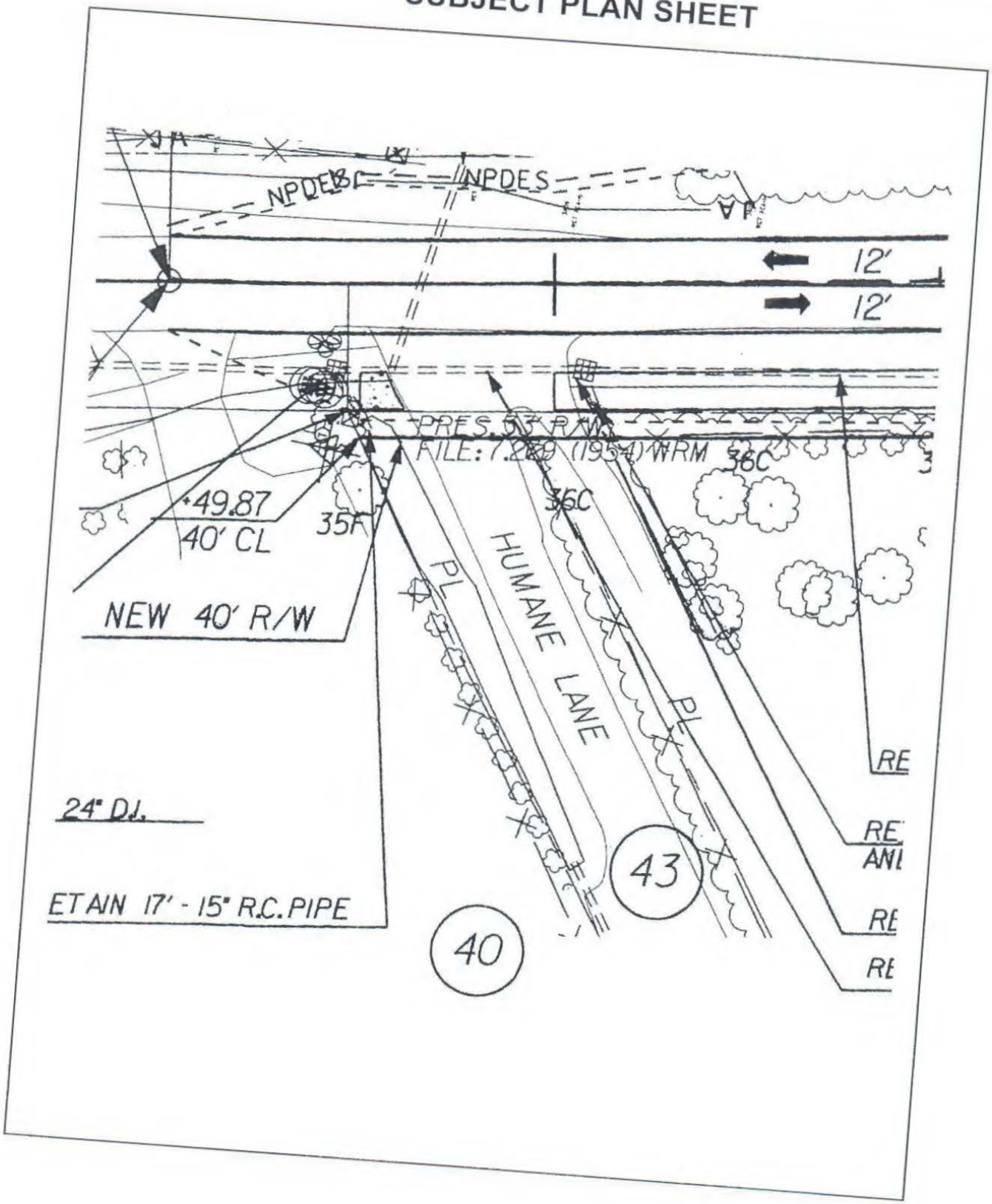
PROPERTY SKETCH

Not to Scale



File #: 7.039102 PIN #: 39102 RD01 Project #: BR07(009) Tract #: 43

SUBJECT PLAN SHEET



(12) Scope of Work: The subject is the road right of way for Humane Way, which is located off Spanish Wells Road, not far the intersection with U.S. Highway 278. The subject is located within the town limits of Hilton Head Island, Beaufort County, South Carolina.

.007 acre, 305 square feet, of permanent right of way is being acquired across the subject's frontage with Spanish Wells Road. The right of way is being acquired as part of a bridge replacement/road improvement project.

This appraisal arrives at an opinion as to the fair market value of the acquisition. The appraisal involves an inspection of the subject, a thorough research of market data including comparable unit sales, and prevailing asking prices and terms for similar properties. Trends in the market are analyzed that would impact the value of the property and a determination is made as to the Highest and Best Use of the property both before and after the acquisition. The appropriate valuation techniques based on market data and analysis in concert with the Highest and Best Use conclusion has been applied.

The Sales Comparison Approach has been used to arrive at an opinion of market value for the subject land both before and after the acquisition. The Cost Approach is used to estimate the contributing value of the site improvements located within the acquisition. The Income Capitalization Approach is not applicable to this assignment.

The steps taken in completion of this assignment are outlined as follow:

Property Identification/History: The subject property was identified through the Beaufort County public records, plans for the project and information provided by the Right of Way Agent.

Property Inspection: Stuart M. Saunders, MAI, CCIM conducted an on-site inspection of the subject property on October 30, 2014. The only purpose in visiting the property is to identify the characteristics and factors that impact the value of the property on the date of the visit for a Right of Way Acquisition, and should not be considered, understood or relied upon to achieve any other objective or purpose. Aerial photographs were also utilized in the inspection of the property.

Property Description: A description of the subject property has been based upon on-site inspection, public records and plans for the project.

Zoning and Restrictions: The subject's zoning has been obtained from the Town of Hilton Head Island's Government website.

Cost Approach: This approach is used to estimate the contributing value of the site improvements located in the acquisition.

PROPOSED ORDINANCE NUMBER 2015-03 ORDINANCE NUMBER 2015-___

AN ORDINANCE OF THE TOWN OF HILTON HEAD, SOUTH CAROLINA, AUTHORIZING THE EXECUTION OF A SALE AND PURCHASE AGREEMENT AND THE EXECUTION OF ONE OR MORE DEEDS FOR THE SALE OF APPROXIMATELY 0.472 ACRES OF REAL PROPERTY ALONG SPANISH WELLS ROAD TO SOUTH CAROLINA DEPARTMENT OF TRANSPORTATION, PURSUANT TO THE AUTHORITY OF S.C. CODE ANN. § 5-7-40 (SUPP. 2011), AND § 2-7-20, *CODE OF THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA*, (1983); AND PROVIDING FOR SEVERABILITY AND AN EFFECTIVE DATE.

LEGISLATIVE FINDINGS

WHEREAS, the Town of Hilton Head Island (hereinafter "Town") owns approximately 0.38 acres of real property known as R511-007-000-1048-0000, which is located on Hilton Head Island, South Carolina, and which is known generally as "Humane Way"; and,

WHEREAS, the Town and Beaufort County, South Carolina jointly own approximately 1.93 acres of real property known as R511-007-000-075A-0000, and jointly own approximately 1.00 acres of real property known as R511-007-000-075F-0000, with both parcels located on Hilton Head Island, South Carolina; and,

WHEREAS, the Town has agreed to sell its interest in portions of the above-described parcels to South Carolina Department of Transportation in accordance with the terms and conditions set forth in that certain Sale and Purchase Agreement, a copy of which is attached hereto as Exhibit "A" (the "Contract"); and,

WHEREAS, under the provisions of S.C. Code Ann. § 5-7-40 (SUPP. 2011) and § 2-7-20, *Code of the Town of Hilton Head Island , South Carolina*, (1983), the conveyance or granting of an interest in real property owned by the Town of Hilton Head Island must be authorized by Ordinance.

NOW THEREFORE, BE IT ORDERED AND ORDAINED BY THE TOWN COUNCIL FOR THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA, AND IT IS ORDAINED BY THE AUTHORITY OF THE SAID COUNCIL, AS FOLLOWS:

Section 1. Execution of Agreement**.**

(a) The Mayor and/or Town Manager are hereby authorized to execute and deliver the Contract in a substantially similar form to that attached hereto as Exhibit "A" for the conveyance of Town-owned real property to South Carolina Department of Transportation; and

(b) The Mayor and/or Town Manager are hereby authorized to take such other and further actions as may be necessary to complete the transactions contemplated in the Contract as authorized hereby, including the execution and delivery of one or more Deeds and all other documents called for in the Contract.

Section 2. Severability.

If any section, phrase, sentence or portion of this Ordinance is, for any reason, held or deemed to be invalid or unconstitutional by any court of competent jurisdiction, then such section, phrase, sentence or portion shall be deemed a separate, distinct and independent provision and shall not affect the remaining portion thereof.

Section 3. Effective Date.

This Ordinance shall become effective upon adoption thereof by the Town Council for the Town of Hilton Head Island, South Carolina.

(SIGNATURE PAGE FOLLOWS)

PASSED, APPROVED AND ADOPTED BY THE TOWN COUNCIL FOR THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA, ON THIS ___ DAY OF _____, 2015.

_____
David Bennett, Mayor

ATTEST:

_____
Victoria L. Pfannenschmidt, Town Clerk

First Reading: _____

Second Reading:_____

Approved as to form: _____
Gregory M. Alford, Town Attorney

Introduced by Council Member:_____

Sale and Purchase Agreement of:

+/- 0.472 Acres (20,578 SF) along Spanish Wells Road (Route S-79)
on Hilton Head Island, South Carolina:

By and Between

The Town of Hilton Head Island, South Carolina

and

Beaufort County, South Carolina

and

South Carolina Department of Transportation

Dated as of: _____

STATE OF SOUTH CAROLINA	**)**	
	)	**SALE AND PURCHASE AGREEMENT**
COUNTY OF BEAUFORT	**)**	

This Agreement (hereinafter, "Agreement") is made and entered into by and between The Town of Hilton Head Island, South Carolina (hereinafter, "the Town"); Beaufort County, South Carolina (hereinafter, "the County"); and South Carolina Department of Transportation (hereinafter, "Purchaser") on this ____ day of _____, 20_____. For purposes of this Agreement, the Town and County are, at times, collectively referred to as "Seller".

W I T N E S S E T H:

1.0. *Sale and Purchase:* For and in consideration of the Total Purchase Price, which represents the amount of just compensation as agreed to by the parties, set forth in Article 3 of this Agreement to be paid by Purchaser to Seller, and in further consideration of the full and faithful performance of the covenants, conditions and agreements hereinafter set forth to be performed, fulfilled and observed by the Seller and the Purchaser, and subject to the fulfillment of the Conditions set forth in Articles 8 and 9 of this Agreement, the Seller agrees to sell and the Purchaser agrees to purchase from Seller that certain real property located on Hilton Head Island, Beaufort County, South Carolina, and which is described in Article 1 of this Agreement below.

1.1 *Joint Real Property:* The real property jointly owned by the Town and the County is described as follows:

> ALL that certain piece, parcel or tract of land with improvements thereon, situate, lying and being on Hilton Head Island, Beaufort County, South Carolina, being approximately 0.18 acres, more or less, and shown and described as the shaded portion of property located within Tract 2 on the attached Exhibit "A".
>
> Beaufort County TMS#: R511-007-000-075A-0000

This being a portion of the same property conveyed to The Town of Hilton Head Island, South Carolina by deed of Blackberry, LLC, a South Carolina limited liability company, dated March 27, 2009, and recorded in the Office of the Register of Deeds for Beaufort County, South Carolina, on March 30, 2009 in Book 2826 at Page 327, and conveyed to Beaufort County, South Carolina by deed of The Town of Hilton Head Island, South Carolina, dated March 2, 2010 and recorded in the Office of the Register of Deeds for Beaufort County, South Carolina, on March 16, 2010 in Book 2940 at Page 2266.

AND ALSO:

ALL that certain piece, parcel or tract of land with improvements thereon, situate, lying and being on Hilton Head Island, Beaufort County, South Carolina, being approximately 0.285 acres, more or less, and shown and described as the shaded portion of property located within Tract 4 on the attached Exhibit "A".

Beaufort County TMS#: R511-007-000-075F-0000

This being a portion of the same property conveyed to The Town of Hilton Head Island, South Carolina by deed of Earl Orage Smith a/k/a Earl Smith, dated March 26, 2009, and recorded in the Office of the Register of Deeds for Beaufort County, South Carolina, on March 30, 2009 in Book 2826 at Page 357, and conveyed to Beaufort County, South Carolina by deed of The Town of Hilton Head Island, South Carolina, dated March 2, 2010 and recorded in the Office of the Register of Deeds for Beaufort County, South Carolina, on March 16, 2010 in Book 2940 at Page 2266.

1.2 *Town Real Property:* The real property owned solely by the Town is described as follows:

ALL that certain piece, parcel or tract of land with improvements thereon, situate, lying and being on Hilton Head Island, Beaufort County, South Carolina, being approximately 0.007 acres, more or less, and shown and described as the shaded portion of property located within Tract 43 on the attached Exhibit "A".

Beaufort County TMS#: R511-007-000-1048-0000

This being a portion of the same property conveyed to the Town of Hilton Head Island, South Carolina by deed of Property Research Holdings, Inc., dated May 17, 2007, and recorded in the Office of the Register of Deeds for Beaufort County, South Carolina, on May 21, 2007 in Book 2571 at Page 713.

1.3 *Intangible Personal Property:* In connection with the Joint Real Property and/or

the Town Real Property, the Town and/or the County may have (i) obtained certain governmental permits and approvals and (ii) obtained certain contractual rights and other intangible assets, which are hereinafter referred to as the "Intangible Personal Property" and which are described as follows:

(a) Any and all contract rights, declarant rights, access rights or easements, utility easements, covenant rights burdening other property in favor of the Joint Real Property and/or Town Real Property, easements, rights with respect to lands or marshlands lying below the S. C. D. H. E. C. - O. C. R. M. Critical Line, development plan approvals, zoning rights or approvals, development permits, utility allocations, State, Federal or Local governmental permits and approvals, S. C. D. H. E. C. - O. C. R. M. Permits; United States Army Corps of Engineers Permits; and,

(b) Any and all rights, funds, rights to funds, including deductibles, associated with or related to any pending or previous environmental cleanup affecting the Joint Real Property and/or Town Real Property; and,

(c) Any and all other rights, contracts, easements, contract rights or governmental or other approvals, regardless of description, which affect, touch or concern the Joint Real Property and/or Town Real Property in any way, shape or form, regardless of description.

1.4 Both the Joint Real Property and the Intangible Personal Property as relates thereto are referred to collectively as the "Joint Real Property". Both the Town Real Property and the Intangible Personal Property as relates thereto are referred to collectively as the "Town Real Property". The Joint Real Property, Town Real Property, and all Intangible Personal Property are, at times, collectively referred to as "the Property".

2.0. *Current Survey:* Purchaser may have prepared, at its own cost and expense, an updated current boundary and as-built survey or ALTA survey of the Property, prepared for and certified to the Purchaser.

2.1 *Delivery of Joint Real Property Documents*: The Town or County shall, upon reasonable demand by Purchaser, tender to Purchaser copies of the following documents in that party's possession:

(a) Any existing title insurance policies in the possession of either party's attorney insuring title to the Property.

(b) Copies of any documents evidencing utility allocations or capacity or other contracts benefiting the Property.

(c) Any and all documents relating to any rights or obligations which run to or from the Property.

(d) Copies of all engineering studies, wetland delineations, environmental studies, surveys and the like of the Property which are in either party's possession. Such studies may be given with appropriate disclaimers.

(e) Copies of any reports, studies or documentation of any type pertaining to any ongoing or previous environmental cleanup affecting the Property.

3.0. *Purchase Price:*

(a) The Purchase Price for the Joint Real Property is Fifty-Seven Thousand Seven Hundred Seventy-Five and 00/100 Dollars ($57,775.00), which shall be paid in cash or its equivalent on the Closing Date. This amount represents the total amount of just compensation, as agreed to by the parties, for acquisition of the Joint Real Property.

(b) The Purchase Price for the Town Real Property is Four Thousand Two Hundred and 00/100 Dollars ($4,200.00), which shall be paid in cash or its equivalent on the Closing Date. This amount represents the total amount of just compensation, as agreed to by the parties, for acquisition of the Town Real Property.

(c) The Purchase Price for the Joint Real Property and the Purchase Price for the Town Real Property is, at times, collectively referred to as the "Total Purchase Price". The Total Purchase Price equals Sixty-One Thousand Nine Hundred Seventy-Five and 00/100 Dollars ($61,975.00). This amount represents the total amount of just compensation, as agreed to by the parties, for acquisition of all property described in this Agreement.

3.1 *Payment and Disbursement of Total Purchase Price:*

(a) At Closing, Purchaser shall pay to Escrow Agent the balance of the Total Purchase Price by certified check made payable to Escrow Agent, or by a wire transfer of cleared funds to the account of Escrow Agent at a financial institution which is designated by Escrow Agent. Escrow Agent shall give written notice of how it wishes for the Total Purchase Price to be paid, together with written bank wire instructions, if applicable, no later than three (3) business days prior to the Closing Date.

(b) Within two (2) business days following receipt and processing of the Total

Purchase Price by Escrow Agent, Escrow Agent shall pay to the Town one half (1/2) of the Purchase Price for the Joint Real Property and the entire Purchase Price for the Town Real Property.

(c) Within two (2) business days following receipt of the Total Purchase Price by Escrow Agent, Escrow Agent shall pay to the County one half (1/2) of the Purchase Price for the Joint Real Property.

4.0 *Title:* Seller shall provide Purchaser with good and marketable title to the Property by sufficient deed(s), free and clear of any and all monetary liens and encumbrances.

4.1. *Title Evidence:* Within thirty (30) days after the Effective Date of this Agreement, Purchaser may obtain a current ALTA Owner's Title Insurance Commitment (the "Commitment") underwritten on, and issued by, a Title Insurance Company of the Purchaser's choosing (hereinafter, the "Title Company"), by which Commitment the Title Company shall agree to insure fee simple marketable title to the Joint Real Property and/or Town Real Property in the name of the Purchaser in an amount equal to the applicable Purchase Price. Seller and Purchaser understand and agree that as of the date of the Title Commitment and the Closing Date, fee simple marketable title to the Property shall be vested in the Seller, and the Commitment shall show and evidence:

(a) That fee simple, marketable title to the Property is vested in the Seller;

(b) That title to the Property is in the condition required by this Article 4. The cost of, or premium associated with, the Commitment, and any Final Policy of Title Insurance issued thereon, shall be the responsibility of and shall be paid for by the Purchaser.

4.2. *Objections to Title:* If Purchaser's title examination or the Commitment shall reveal that Seller's title to the Property is subject to any easements, covenants, clouds on or to the title, encroachments, boundary discrepancies, liens, encumbrances, or any other matter affecting title, or Purchaser's proposed use of the Property, then Purchaser shall notify Seller, in writing, of such title defects and Purchaser's objection to the same within five (5) days after the delivery of

the Commitment. Upon such notification, the same shall be treated as defect(s) in title ("Title Defects"). Unless Purchaser delivers said written objections within the said five (5) day period following the delivery of the Commitment, it shall be conclusively deemed that Purchaser has accepted title to the Property in its then-existing condition.

4.3. *Seller's Right to Cure:* Seller shall have thirty (30) days from receipt of Purchaser's written notice of any Title Defects to Cure (hereinafter defined), or to cause to be Cured, the Title Defects. The Town or County (as the case may be) agrees to use its best efforts and due diligence in Curing, or in causing to be Cured, the Title Defects. If said thirty (30) day period given Seller to Cure the Title Defects shall extend beyond the Closing Date, and Seller does not Cure, or cause to be Cured, the Title Defects before the Closing Date, then closing shall be held within ten (10) days after Seller delivers written notice to Purchaser that the Title Defects have been Cured. "Cured" as used herein means that a title insurance company authorized to do business in South Carolina and a member of the American Land Title Association will issue a Title Insurance Policy insuring title to the Real Property at standard rates and with only the standard exceptions.

4.4. *Seller's Failure to Cure:* If Seller cannot Cure, or cause to be Cured, the Title Defects within the said thirty (30) day period, or within such longer period to which the Seller and Purchaser may agree in writing, then the Purchaser shall have the option of:

(a) Closing this transaction in accordance with the terms and conditions hereof, and accepting title to the Property in its then-existing condition by deed, taking exception to such unCured Title Defects, with such adjustments to the Purchase Price(s) as are agreed to by the Parties; or,

(b) Terminating this Agreement without further obligations or liabilities or proceeding to acquire the subject properties subject to the provisions of the South Carolina Eminent Domain Procedure Act.

4.5. *Subsequent Matters:* The Seller acknowledges that a period of days will elapse between the delivery of the Commitment as required herein and Closing. Acceptance of the Commitment by the Purchaser shall not be deemed a waiver of any Title Defect arising between the date of delivery of the Commitment and the date of Closing.

(a) The Purchaser shall notify the Seller of any Title Defects arising subsequent to delivery of the Title Commitment prior to closing.

(b) Upon notification to Seller by Purchaser of any Title Defects arising subsequent to delivery of the Title Commitment, the "Cure" provisions of Article 4.3 and 4.4 shall become effective.

5.0. *Closing:* This transaction shall be "Closed" and title to the Property shall be conveyed from Seller to Purchaser by delivery of the deed(s) and other documents required herein from Seller to Purchaser at 10:00 o'clock A. M. on the Closing Date at the Office of the Escrow Agent, or at such other place as Purchaser and Seller shall mutually agree in writing. Subject to fulfillment of all of the Seller's obligations and any conditions hereunder, the Closing Date, unless otherwise modified or extended by mutual agreement of the Seller and Purchaser in writing, shall occur on or before ninety (90) days after the Effective Date of this Agreement.

5.1. *The Town's Obligations at Closing:* At Closing, the Town shall deliver to Purchaser, at the Town's expense, the following Closing Documents:

(a) Good and sufficient deed(s) so as to convey to Purchaser Fee Simple, Marketable Title to the Property, as provided in Article 4 above. The deed(s) shall be in recordable form, with documentary stamps (if any) affixed, executed by the Town and duly acknowledged before a Notary Public.

(b) A "Certification by Entity Transferor," certifying that the Town is not a "foreign person" as that term is used and defined in Section 1445 (f)(3) of the Internal Revenue Code of 1986, as amended.

(c) A mechanic's lien affidavit, duly executed by the Town and acknowledged before a notary public, attesting to the absence, unless otherwise provided for in this Agreement, or unless created by acts of the Purchaser, of any claims of lien or potential lienors and

further attesting that there have been no improvements to the Property for ninety-five (95) days immediately preceding the Closing Date for which the cost thereof remains unpaid.

(d) A South Carolina residency affidavit certifying the address, residence and Federal Identification Number of the Town to establish the withholding requirements of S.C. Code Ann. § 12-9-310 (Supp. 2011), and South Carolina Revenue Ruling Number 90-3.

(e) Full and complete releases, in recordable form, of any mortgages, liens, claims or other encumbrances to the title of the Property, except as may be otherwise provided in Article 4 above.

(f) Such other documents as Purchaser, Purchaser's Attorney or Purchaser's Title Insurance Company may reasonably require or deem as necessary to convey the Property to the Purchaser in accordance with the terms and provisions of this Agreement.

(g) Certified copy of the Ordinance of the Town Council authorizing the sale of the Property and execution of this Agreement.

(h) Certified copy of the Minutes of the Town Council meeting(s) wherein the Ordinance referenced herein above was approved.

5.2. *The County's Obligations at Closing:* At Closing, the County shall deliver to Purchaser, at the County's expense, the following Closing Documents:

(a) Good and sufficient deed(s) so as to convey to Purchaser Fee Simple, Marketable Title to the Property, as provided in Article 4 above. The deed(s) shall be in recordable form, with documentary stamps (if any) affixed, executed by the Town and duly acknowledged before a Notary Public.

(b) A "Certification by Entity Transferor," certifying that the County is not a "foreign person" as that term is used and defined in Section 1445 (f)(3) of the Internal Revenue Code of 1986, as amended.

(c) A mechanic's lien affidavit, duly executed by the County and acknowledged before a notary public, attesting to the absence, unless otherwise provided for in this Agreement, or unless created by acts of the Purchaser, of any claims of lien or potential lienors and further attesting that there have been no improvements to the Property for ninety-five (95) days immediately preceding the Closing Date for which the cost thereof remains unpaid.

(d) A South Carolina residency affidavit certifying the address, residence and Federal Identification Number of the County to establish the withholding requirements of S.C. Code Ann. § 12-9-310 (Supp. 2011), and South Carolina Revenue Ruling Number 90-3.

(e) Full and complete releases, in recordable form, of any mortgages, liens, claims or other encumbrances to the title of the Property, except as may be otherwise provided in Article 4 above.

(f) Such other documents as Purchaser, Purchaser's Attorney or Purchaser's Title Insurance Company may reasonably require or deem as necessary to convey the Property to the Purchaser in accordance with the terms and provisions of this Agreement.

(g) Certified copy of the Ordinance of the County Council authorizing the sale of the Joint Real Property and execution of this Agreement.

(h) Certified copy of the Minutes of the County Council meeting(s) wherein the Ordinance referenced herein above was approved.

5.3. *Purchaser's Obligations at Closing:* At Closing, the Purchaser shall deliver to Seller, at Purchaser's expense, the following:

(a) The balance of the Total Purchase Price.

(b) Such other documents as Seller or Seller's attorney may reasonably require or deem necessary to convey the Property to the Purchaser in accordance with the terms and provisions of this Agreement.

6.0. *Default by Purchaser:* Purchaser is not obligated to purchase the Property and reserves the rights to terminate this Agreement without penalty, except for those provided in the South Carolina Eminent Domain Procedure Act, and pursue acquisition the Property, or a portion thereof, in accordance with the provisions of the South Carolina Eminent Domain Procedure Act.

7.0. *Default by Seller:*

(a) *Default by the Town:* Except as may be otherwise expressly provided or limited herein with respect to any specific act or omission, if the Town shall default in any other obligations, covenants, or agreements contained within this Agreement or any of the Exhibits hereto, and shall remain in default after ten (10) day's written notice specifying the default and demanding that the default be cured, then the Purchaser shall be entitled to pursue any remedy at law or in equity against the Town, including an action for damages or for Specific Performance of this Agreement. The provisions of this Article 7 shall be binding upon the successors and assigns of the Seller, and shall survive the Closing of the transaction contemplated herein.

(b) *Default by the County:* Except as may be otherwise expressly provided or limited herein with respect to any specific act or omission, if the County shall default in any other obligations, covenants, or agreements contained within this Agreement or any of the Exhibits hereto, and shall remain in default after ten (10) day's written notice specifying the default and demanding that the default be cured, then the Purchaser shall be entitled to pursue any remedy at law or in equity against the County, including an action for damages or for Specific Performance of this Agreement. The provisions of this Article 7 shall be binding upon the successors and assigns of the Seller, and shall survive the Closing of the transaction contemplated herein.

8.0. *Conditions to Purchaser's Obligation to Close:* The obligation of the Purchaser to purchase the Property from the Seller is subject to satisfaction, as of the Closing Date, of the following conditions (any of which may be waived, in writing, in whole or in part by Purchaser at or prior to Closing):

(a) All of the representations and warranties of the Seller set forth herein shall be true on and as of the Closing in all respects, as though such representations and warranties were made at and as of the Closing; and all covenants, agreements and documents required of the Seller in this Agreement shall have been performed, complied with or delivered (as the case may be) in accordance with this Agreement.

(b) The Property shall not be in material violation of any governmental laws, ordinances, rules or regulations, and there shall be no action, suit or proceeding pending or filed against or affecting the Property or any portion thereof, or relating to or affecting or arising out of the ownership or development of the Property or any portion thereof, in any state or federal court or by any federal, state, county or municipal department, commission, board bureau, or agency or other governmental instrumentality.

In the event any of the above stated conditions is not satisfied or waived in writing by Purchaser prior to Closing, this Agreement shall terminate on the option of the Purchaser, and neither Party shall have any further obligation or rights with respect to the other.

9.0. *Conditions to Seller's Obligation to Close:* The obligation of the Seller to sell the Property to the Purchaser is subject to:

(a) the Town Council for the Town of Hilton Head Island, South Carolina adopting an Ordinance authorizing the sale of the Property and the execution of this Agreement; and

(b) the County Council for Beaufort County, South Carolina adopting an Ordinance authorizing the sale of the Joint Real Property and the execution of this Agreement.

10.0. *Representations and Warranties of Seller:* To induce Purchaser to enter into this Agreement and to purchase the Property, Seller represents and warrants (which representations and warranties shall survive the Closing) to Purchaser as follows:

(a) As of the date of this Agreement and as of the date of Closing, Seller will have all requisite legal power and authority to execute and deliver the deed(s) and other documents to be delivered pursuant to this Agreement. The individual(s) executing this Agreement on behalf of Seller has, and as of the date of Closing will have, express authority and full power on behalf of Seller to enter into and deliver this Agreement and the deed(s) and other documentation required hereunder.

(b) Other than work or material contracted for by Purchaser, as of the Closing, no work will have been performed or will be in process at the Property, and no materials will have been delivered to the Property that might provide the basis for the filing of a Mechanic's, Materialman's or other lien against the Property or any portion thereof. The requirements set forth in this Article shall be deemed satisfied if the Title Company, based upon Seller's mechanic's lien affidavit, is willing to give Purchaser affirmative mechanic's lien coverage.

(c) There has been no deferral of taxes with respect to this Property.

(d) Other than is expressly provided for herein, Seller shall not grant any easements, or enter into any covenants or agreements concerning the Property or title to the Property, or in any other way affect the Property or title to the Property without the written consent of Purchaser.

(e) There are no rights or claims of parties in possession not shown by the Public Records for Beaufort County, South Carolina; and there is no litigation now pending or threatened against the Seller which would materially affect the Property, title to the Real Property, the execution, delivery or enforceability of this Agreement, or the Seller's performance or other obligations hereunder.

(f) No options, leases or other contracts are still outstanding which give any other party a right to purchase the Property.

11.0. *Brokers:* Seller and Purchaser warrant and represent that no broker, finder, or other person is entitled to a commission, finder's fee or other compensation in connection with this Agreement, and Seller shall indemnify and hold harmless the other party from any and all

claims, liabilities, losses, damages, costs and expenses arising from the claim of any other broker, finder or other person for such compensation, arising by, under or through such party. The obligations under this Article 11 shall survive the Closing.

12..0 *Effective Date:* The "Effective Date" of this Agreement shall be the later of: (a) the date upon which the officials of The Town of Hilton Head Island, South Carolina, execute and deliver this Agreement to Purchaser; (b) the date upon which the officials of Beaufort County, South Carolina, execute and deliver this Agreement to Purchaser; or (c) the date upon which the officials of the Purchaser execute and deliver this Agreement to Seller.

13.0 *Miscellaneous:*

13.1. *Assignability:* This Agreement may not be assigned by either the Purchaser or the Seller without the express written consent of both parties.

13.2 *Binding Effect:* This Agreement shall inure to the benefit of and shall be binding upon the Seller and Purchaser and their respective successors and assigns.

13.3. *Amendment, Changes and Modifications:* Except as otherwise provided herein, this Agreement may not be effectively amended, changed, modified or altered without the written consent of both parties hereto.

13.4. *Severability:* In the event that any provision of this Agreement shall be held invalid or unenforceable by any court of competent jurisdiction, such holding shall not invalidate or render unenforceable any other provision hereof.

13.5. *Execution in Counterparts:* This Agreement may be simultaneously executed in several counterparts, each of which shall be an original and all of which shall constitute but one and the same instrument.

13.6. *Applicable Law:* This Agreement shall be governed by and construed in accordance with

the laws of the State of South Carolina.

13.7. *Captions:* The captions or headings herein are for convenience only and in no way define, limit or describe the scope or intent of any provisions or sections of this Agreement.

13.8. *Recording:* The parties hereto may not record this Agreement, or a short form Memorandum thereof, in the Office of the Register of Deeds for Beaufort County, South Carolina.

13.9. *Plural/Singular:* Where appropriate, the use of the singular herein shall include and be deemed to be the plural, and the use of the plural herein shall be deemed to include the singular.

13.10. *No Third Party Beneficiaries:* The Parties hereto affirmatively represent that this Agreement is made solely for the benefit of the parties hereto and their respective successors and assigns and not for the benefit of any third party who is not a signature party hereto. No party other than the signature parties and their respective successors and assigns hereto shall have any enforceable rights hereunder, or have any right to the enforcement hereof, or any claim for damages as a result of any alleged breach hereof.

13.11. *Notices:* All notices, applications, requests, certificates or other communications hereunder shall be sufficiently given and shall be deemed given when delivered in person, or mailed by regular first class mail, postage prepaid (in such case, delivery shall be deemed complete upon mailing), addressed as follows, or to such other place as may be designated in writing by the parties:

To the Town: The Town of Hilton Head Island, South Carolina
Stephen G. Riley, ICMA-CM, Town Manager
One Town Center Court
Hilton Head Island, SC 29928

With Copy to: Gregory M. Alford, Esq.
Alford & Thoreson, LLC
Post Office Drawer 8008
Hilton Head Island, SC 29938-8008

To the County: Beaufort County, South Carolina
ATTN: Josh Gruber, Esq.
P.O. Box 1228
Beaufort, SC 29901

With Copy to: Thomas A. Bendle, Jr., Esq.
Howell, Gibson & Hughes, P.A.
P.O. Box 40
Beaufort, SC 29901

To Purchaser: _____
_____
_____
_____

With Copy to: _____
_____
_____
_____

13.12. *Further Assurances and Corrective Documents:* The Seller and Purchaser agree to do, execute, acknowledge, deliver or cause to be done all such further acts as may be reasonably determined to be necessary to carry out this Agreement and give effect hereto. The Seller and Purchaser agree that each shall, upon request, execute and deliver such other or corrective documents, or any such document as may be requested by any governmental or regulatory agencies, including but not limited to any such documents relating to any pending or previous environmental cleanup affecting the Property, as may be reasonably determined to be necessary, either before or after the Closing. The obligations of this Article 13.12 shall survive the Closing.

14.0. *Possession:* Possession of the Property shall be delivered to the Purchaser at Closing, provided, however, that the Total Purchase Price, minus adjustments and prorations, is paid in

full by or on behalf of Purchaser at Closing.

15.0. Omitted.

16.0. *Closing Costs*:

16.1. *Seller's Closing Costs:* Seller shall be responsible to pay for the Cost of:

(a) Any documentary stamp expense or taxes which may be payable to the State of South Carolina and/or the County of Beaufort; and,

(b) Any other Seller's Closing Costs which are customary in Beaufort County, South Carolina.

16.2. *Purchaser's Closing Costs:* Purchaser shall be responsible to pay the cost of:

(a) Recording of the Deed;

(b) The Cost of any title insurance premium chargeable for the Commitment and any policy of Title Insurance issued therefrom; and,

(c) Any other Purchaser Closing Costs which are customary in Beaufort County, South Carolina.

17. *Attorney's Fees and Costs:* Payment of Attorney fees and costs are subject to the provisions of the South Carolina Eminent Domain Procedure Act..

18. *Damage or Risk of Loss:* The risk of loss of complete or partial destruction of the Property shall rest with the Seller up to the time that the Closing occurs. If the Property is damaged, but repairable prior to Closing, Seller has the option of repairing and proceeding. If the Property is damaged, but un-repairable prior to Closing, this Agreement shall be terminated, and neither party shall have any further rights or obligations with respect to the other.

19. *Condemnation:* If, between the date of this Agreement and the Closing, a taking or condemnation of the Property is threatened or commenced by any party or entity other than Purchaser, Purchaser may elect, in writing, within five (5) days after receipt of notice from Seller of such taking or condemnation, accompanied by information regarding the amount and payment

of the condemnation proceeds, to terminate this Agreement or to purchase the Property without regard to such condemnation. If Purchaser fails to notify Seller of Purchaser's election, Purchaser will be deemed to have elected to proceed with the purchase of the Property without regard to such taking or condemnation. In the event Purchaser elects to purchase, Seller shall have no obligation to repair or replace any of the Property destroyed, nor shall the purchase price be adjusted. If Purchaser elects to terminate this Agreement, Purchaser shall notify Seller of such election in writing; this Agreement shall be of no further force and effect; Escrow Agent shall immediately return the Deposit to Purchaser; and Seller shall be entitled to receive any condemnation awards payable as a result of such taking or condemnation. If Purchaser elects to purchase the Property despite such taking or condemnation Seller shall assign its rights to and Purchaser shall be entitled to receive any condemnation awards payable as a result of such taking or condemnation. However, in the event Seller determines that the amount of condemnation awards payable as a result of such taking or condemnation exceeds the Purchase Price, Seller may elect at any time and in their sole discretion to terminate this Agreement and retain and receive all rights to such condemnation awards, and Purchaser shall be entitled to the return of all deposits paid, and neither party shall have any further rights or obligation against the other. Nothing in this Article shall apply to any taking or condemnation instigated by Purchaser.

20. *Escrow Agent:* The "Escrow Agent" shall be selected by the South Carolina Department of Transportation. Deposit with the Escrow Agent of the Total Purchase Price, the instruments of conveyance and such other funds and/or documents as are required of any Party under the terms of this Agreement shall be deemed to be a good and sufficient tender of performance in accordance with the terms hereof. If any dispute should arise as to whether Escrow Agent is obligated to deliver any Escrow Deposit, or any funds or documents which it

holds, Escrow Agent shall not be required to make delivery thereof, but, in such event shall hold the same until receipt, by Escrow Agent, of written authorization from Seller and Purchaser directing the disposition of the same. In the absence of such written authorization, Escrow Agent may hold any Escrow Deposit, or any other funds or documents in connection with this transaction in its possession until a final determination of the rights of the Parties by a Court of competent jurisdiction. If such written authorization is not given or proceedings for such determination are not begun and diligently continued, Escrow Agent may institute an appropriate proceeding for leave to place any Escrow Deposit, or any other funds or documents in connection with this transaction in its possession with the Clerk of Court for Beaufort County, South Carolina, pending such determination. Escrow Agent shall not be charged with notice of any fact or circumstance unless and until written notice of the same is received by Escrow Agent. Upon making the delivery of the funds or documents which Escrow Agent may hold in accordance with the provisions of this Article 20, Escrow Agent shall have no further obligation or liability to Purchaser and Seller, and Purchaser and Seller agree to indemnify and hold Escrow Agent harmless from any such liability.

21. *Matters Subsequent to Closing:* Seller acknowledges that it has obligations under this Agreement to be fulfilled subsequent to Closing. Seller acknowledges that all such obligations survive the Closing whether or not a specific statement to that effect is set forth in connection with each such obligation.

(SIGNATURE PAGE FOLLOWS)

IN WITNESS WHEREOF, the Seller and the Purchaser caused their duly authorized officers and representatives to execute this Agreement as of the date and year first above written.

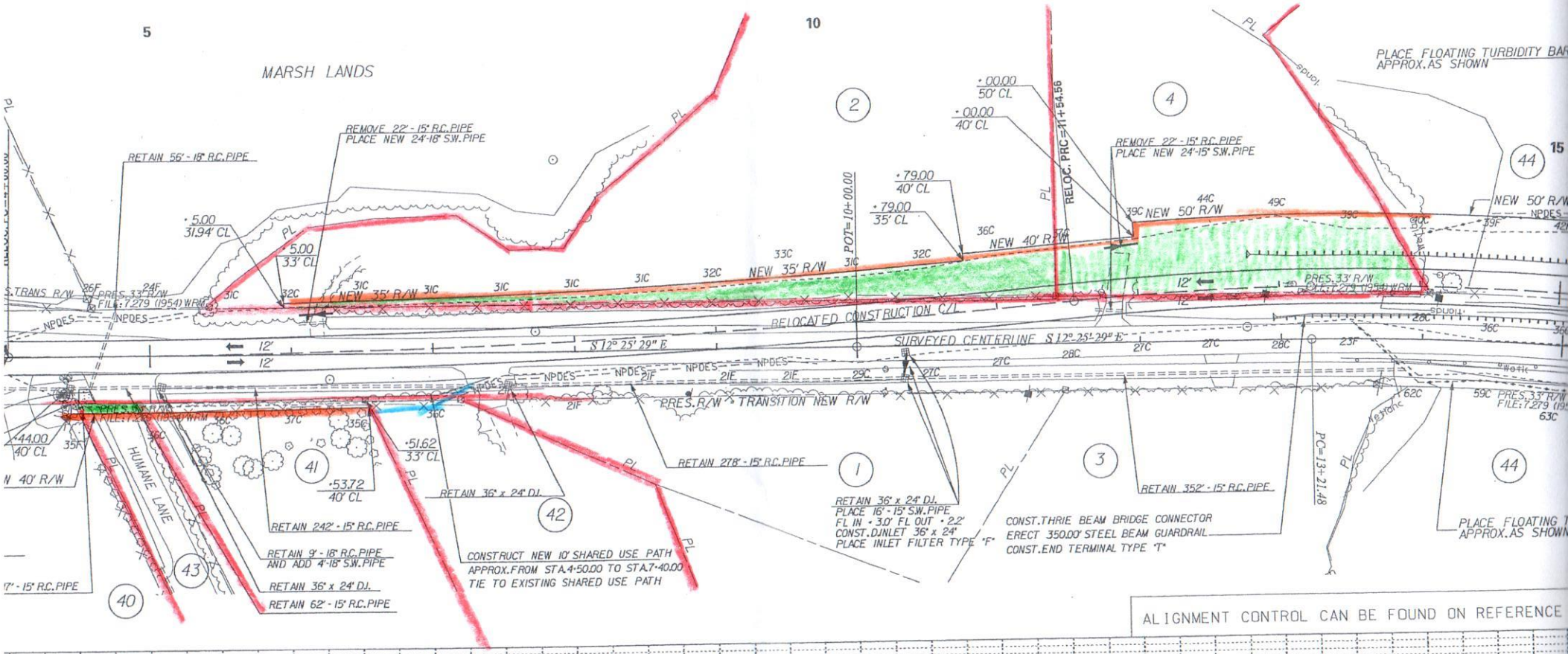
WITNESSES:	**THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA**
_____	**By:**_____ **David Bennett, Mayor**
_____	**Attest:** _____ **Stephen G. Riley, ICMA-CM** **Town Manager**

WITNESSES:	**BEAUFORT COUNTY, SOUTH CAROLINA**
_____	**By:**_____
	Its:_____
_____	**Attest:**_____
	Its:_____

WITNESSES:	**SOUTH CAROLINA DEPARTMENT OF TRANSPORTATION**
_____	**By:**_____
	Its:_____
_____	**Attest:**_____
	Its:_____

EXHIBIT “A”

PROPERTY DEPICTION


MARSH LANDS
REMOVE 22'-15" R.C.PIPE
PLACE NEW 24'-18" S.W.PIPE
RETAIN 56'-18" R.C.PIPE
+5.00
31.94' CL
+5.00
33' CL
NEW 35' R/W
POT=10+00.00
+79.00
40' CL
+79.00
35' CL
+00.00
50' CL
+00.00
40' CL
RELOC. PRC=11+54.56
NEW 40' R/W
NEW 50' R/W
PRES. 33' R/W
RELOCATED CONSTRUCTION C/L
S 12° 25' 29" E
SURVEYED CENTERLINE S 12°-25'-29" E
PRES. R/W TRANSITION NEW R/W
PLACE FLOATING TURBIDITY BAR
APPROX. AS SHOWN
NEW 50' R/W
+44.00
40' CL
+51.62
33' CL
+53.72
40' CL
HUMANE LANE
RETAIN 242'-15" R.C.PIPE
RETAIN 9'-18" R.C.PIPE
AND ADD 4'-18" S.W.PIPE
RETAIN 36" x 24" DJ.
RETAIN 62'-15" R.C.PIPE
RETAIN 36" x 24" DJ.
CONSTRUCT NEW 10' SHARED USE PATH
APPROX. FROM STA. 4+50.00 TO STA. 7+40.00
TIE TO EXISTING SHARED USE PATH
RETAIN 278'-15" R.C.PIPE
RETAIN 36" x 24" DJ.
PLACE 16'-15" S.W.PIPE
FL IN +3.0' FL OUT +2.2'
CONST. DJ INLET 36" x 24"
PLACE INLET FILTER TYPE "F"
RETAIN 352'-15" R.C.PIPE
CONST. THRIE BEAM BRIDGE CONNECTOR
ERECT 350.00' STEEL BEAM GUARDRAIL
CONST. END TERMINAL TYPE "T"
PC=13+21.48
PLACE FLOATING T
APPROX. AS SHOWN
ALIGNMENT CONTROL CAN BE FOUND ON REFERENCE
FINISHED GRADE
350' V.C.
(+) 0.10%
(-) 0.44%
VPI = 11+00.00
Elev. = 8.05

TOWN OF HILTON HEAD ISLAND

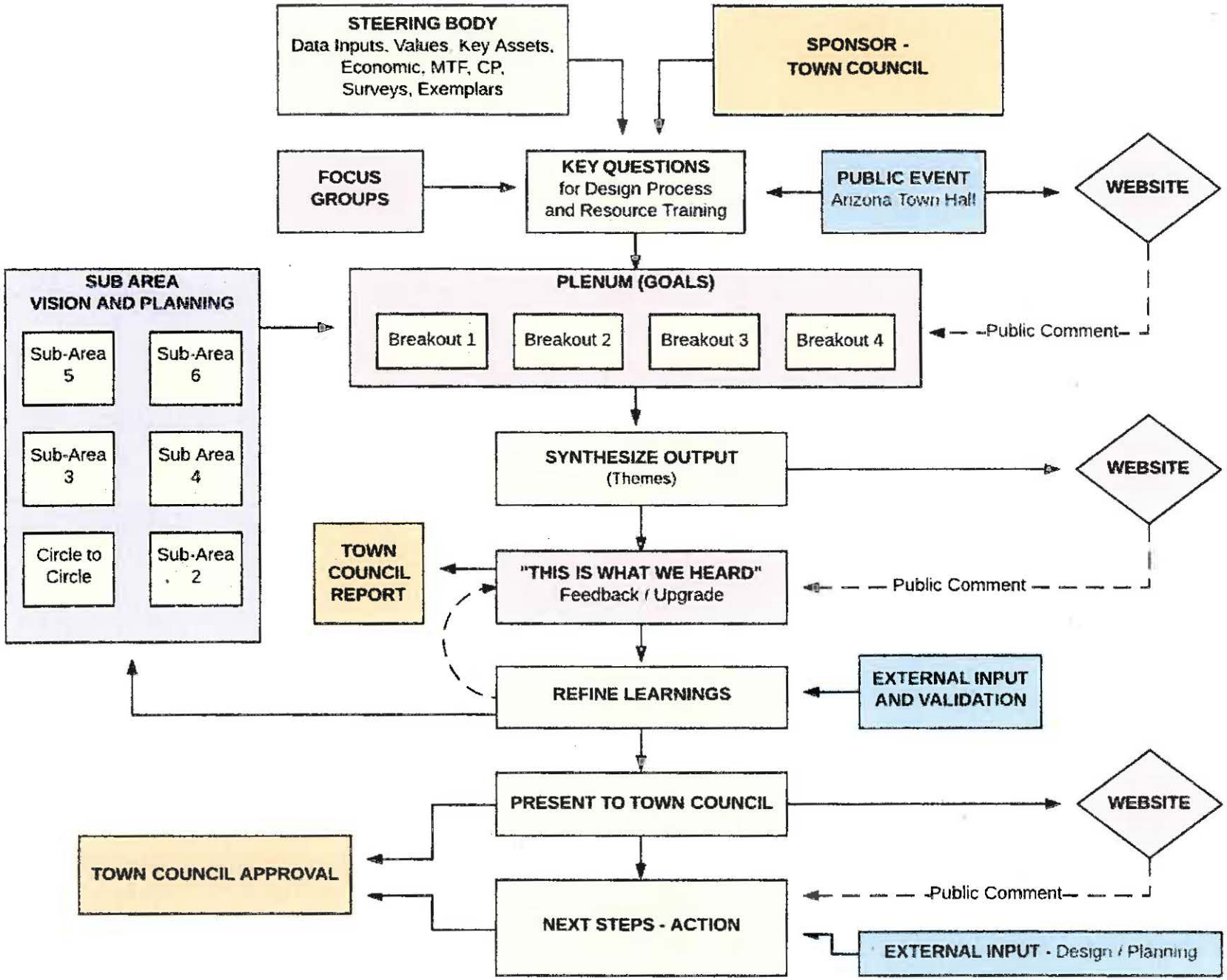
Community Development Department

TO: Town Council
VIA: Stephen G. Riley, ICMA~CM, *Town Manager*
FROM: Charles F. Cousins, AICP, Director of Community Development
DATE July 14, 2015
SUBJECT: Developing a Vision for the Island

Attached are several documents related to visioning the Mayor asked staff provide to Town Council. The first is a flow chart and accompanying document prepared by Terry Ennis describing a process that could be used to develop a vision for the Island. The second set of documents was provided by Arizona Town Hall and relates to a visioning process it undertook for the City of Scottsdale, Arizona.

Town Government Center ♦ One Town Center Court ♦ Building C
Hilton Head Island ♦ South Carolina ♦ 29928
843-341-4757 ♦ (FAX) 843-842-8908

FLOW CHART - POTENTIAL 2015 VISIONING PROCESS FOR HILTON HEAD ISLAND



PROCESS FOR ISLAND VISIONING AND MASTER PLANNING

(Reference Graphic Depiction)

3/15/15

Hilton Head Island Definitions:

> **Vision Statement**: "A future state and a coordinated plan of action." The visioning process develops consensus about what future the community wants and then, decides what is necessary to achieve it.
>
> **Sub-Area Master Plan**: Here, a sub-area master plan defines the special character of the area, identifies land uses and intensity of development, and projects public infrastructure and capital investment to meet the goals of the sub-area.

Entire visioning process includes following phases: Creation, Adoption, Competency and Management (ex. Coligny Process, but with follow through of Management)

Principles of Visioning Process: Must be open. Expansive public involvement. Inclusive in seeking input. Input must be documented. Feedback and decisions tracked to build credibility and public support of process.

Public involvement is crucial. Therefore, robust publicity and disciplined outreach are imperative.

Public understanding of trade-offs and rationale of decisions is important. Therefore, publicizing decisions along the way is important.

Best Practices Process Outline: (See graphic)

> "Sponsor": The Town Council will receive reports from Steering Body at Synthesize Output and Refine Learnings, as well as, Present to Town Council.
>
> The 7 member "Steering Body" has the responsibility of managing the process, establishing the key questions, training the facilitators. The Steering Body communicates what it hears objectively. It does not generate policy unilaterally.
>
> "Public Event": Arizona Town Hall/Hilton Head Institute. This kicks off the broader visioning process and helps establish Key Questions. Also, the event might include a well-know keynote speaker to share great examples of successes elsewhere.
>
> The "Website" is a conduit for public comment and visioning process information, status and calendar.

The "Plenum" and break-outs, similar to those used in the Coligny Process, will give the public an opportunity to address the Key Questions and establish goals and priorities.

After the Plenum, the Steering Body will "Synthesize Output" into themes. This information will be reported to the Town Council and added to the website for broad distribution and public comment.

The "This Is What I Heard" step is of crucial importance in building public buy-in and process credibility. If refinements or modifications are needed, the Steering Body will make the adjustments and once again, play back what it thought it heard.

Only after accurately portraying the themes and broad action steps, the Steering Body will "Present to Town Council" its findings.

With Town Council approval the process will advance into "Next Steps/Action Plans" with design and planning of priority areas, the emphasis being on infrastructure and land use, timelines and management.

Integration of Sub-Areas Visions: In some instances, like the Circle to Circle Task Force, sub-area planning may lead or be going on simultaneously with the island-wide visioning process. Where it leads, the sub-area vision will be factored into the Key Questions. Where it parallels or lags the broader process, the output of "Refine Learnings" will be given to the Sub-Areas for their integration.

External Input: Experts with relevant experience could offer a valuable outside perspective just prior to "Key Questions", "Refine Learnings" and "Present to Sponsor". This is intended to validate the direction of the process, or perhaps, raise issues.

Guidelines for selection of Steering Body members: Value driven/thought leader, leader/innovator, proven professional competence, network influence, motivated, power of agency to "see" and influence and even create change, ability to swing opinions, high knowledge and/or to assimilate knowledge and apply, synthesizers. Selection is not based upon "stakeholder representation", first and foremost, but on the above qualities.

Initial Key Questions are of paramount importance. Therefore, the selection of the Steering Body is crucial.

Examples of initial Key Questions:

In last few years, day trippers and sightseeing has contribute as much or more economic output to HHI as heads in beds. What has caused this? Will it continue?

How will the Island continue to capture and manage this trend (parking, access, restaurants...). Do we want it to continue?

There has been a migration of economic output (business movement) from HHI to greater Bluffton. Is this important? Do we care about region or Island? Are these businesses we want to loose?

Should the Island care about tourism trends toward experiences? Is this something we have competence, assets and capability to enhance? Historical corridors? Fishing? Wild life?

How will the third phase (potentially disruptive) "internet of things & connectivity" impact the island? Impacts (positive and negative) on parking, shopping/roads, business (disruptive to transaction based business)

What boundaries do we want to set and examine (regions, Island, segments of Islands?

The largest (non government) sector is real estate by far. What do we do to protect and enhance this sector?

There are rapid growth sectors in heath care (non ambulatory) and management services. Why is this so? Should we protect, enhance, encourage or just let it happen?

Environment – HHI is the asset that generates wealth. The environment protects the asset? What more do we need to do to protect the environment (tree canopies, water, air?)

Can the island flourish into the future as an tourist destination and retirement community? Would we want that anyway?

(Rough Skeleton Straw Man, discussion purposes only) thoughts for Selection Characteristics needed for Steering Committee Members

Ideal Characteristics

- Values driven (strong sense of values apparent)
- Thought leader/innovative thinker/ability to "visualize" and articulate views in ways that influence opinion.
- Professional competence (any field) and background
- Motivated by earnest desire to enrich quality of life for whole community (as opposed to a particular stakeholder group)
- Ability (and humility) to synthesize thoughts of others into focused themes and ideas for action.
- Ideally have some experience in visioning development practices (likely corporate)

Avoid selection based on stakeholder representations, or political influence, or ward representation.

Consider Candidates drawn from (but not representing). Discussion examples only:

- New growth sectors such as Healthcare and Managerial/Professional/Financial services
- Mid career/family with children professionals
- Real Estate and Tourism Industry (two largest sectors)
- Government (not necessarily HHI)
- Second home/work from home with attachment to Island.
- Traditional Island Community

Wednesday, April 22, 15

ARIZONA TOWN HALL

Creating Solutions for 50 Years!

VISIONING TOWN HALL

Process & Scheduling Options

1. Traditional
2. Downtown Scottsdale 2006
3. Alternatives

1. Traditional

- 3 days
- Full day
- Consecutive days
- 150 participants

2. Downtown Scottsdale 2006

- 3 days
- ½ day sessions
- Non-Consecutive days (over 1 week)
- 100 participants

3. Recommended Alternative

- Three half day discussion sessions
- 1 half day plenary session
- Non-consecutive days (over 2 weeks)
- Up to 200 participants
- Each session at different locations
  (north, central, south)

Recommended Alternative

- Each discussion session is held at a different location and on a different date
- Participants attend one of these three events
- Plenary session held within 2 weeks of last event
- All participants attend plenary session
- Draft recommendations report available prior to plenary session
- Report finalized at plenary session

Application and Selection Process

- Open, online applications
- All applicants can propose issues or ideas
- Participants selected by Town Hall staff with emphasis on diversity
- Those not selected will be given other opportunities to participate

Outreach


Today's Agenda
1. Inform
2. Engage & Empower
Discussion Question:

Youth Town Hall

ARIZONA TOWN HALL

Creating Solutions for 50 Years!

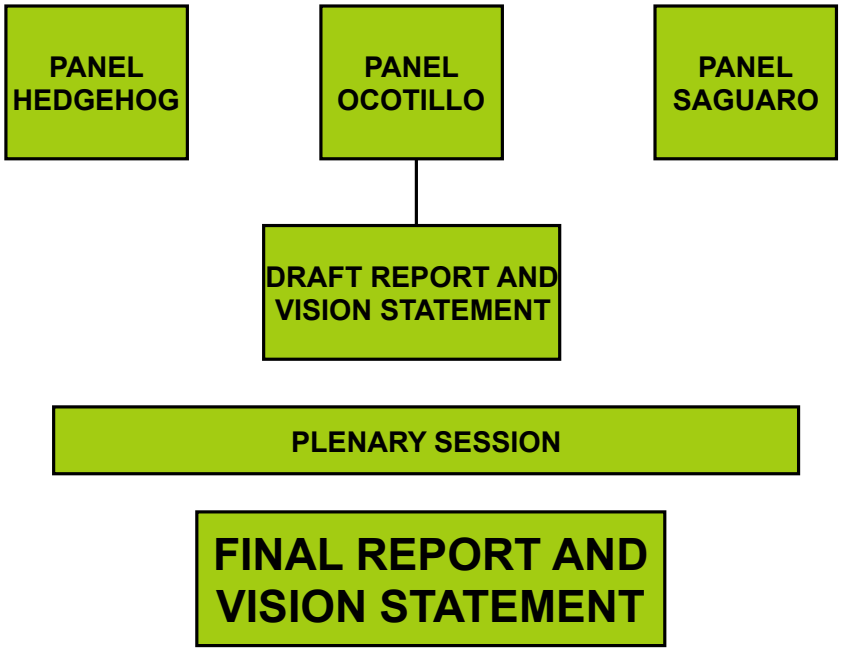
Visioning Scottsdale Town Hall
February 6, 7 and 11, 2013
Scottsdale, Arizona
Monterra

AGENDA

SCOTTSDALE GENERAL PLAN 2014
your plan, your future

The Visioning Scottsdale Town Hall Process

From the Group Statement to the Final Report



OVERVIEW OF THE ARIZONA TOWN HALL PROCESS

Arizona Town Hall is a private nonprofit corporation founded in 1962 for the purpose of educating, engaging and empowering Arizonans to better solve critical policy issues. Much of the success of the Arizona Town Halls lies in the fact that the process incorporates the knowledge, thoughts and ideas of all the participants.

Panel Discussions

The Town Hall begins with panel discussions. Each panel addresses the same discussion outline during the first portion of the Town Hall. The process and guiding principles for the panel discussions are as follows:

- The Panel Chair reads one question at time and discussion follows.
- It is important to stick to the question at hand.
- The panel strives for consensus (votes are taken only if absolutely necessary).
- Consensus is reached when n one wants to add anything, and n one objects strongly to the wording offered.
- The recorder's role is to keep the panel on time, capture the consensus comments, read back consensus statements to the panel and make edits with participants.
- The viewpoints of all participants are considered equally valuable, regardless of title or position.
- Discussions are encouraged to be robust while maintaining a respect for different viewpoints. Participants are allowed to criticize concepts—not people.
- Minority viewpoints must be very strong to find their way into the final document (at least 1/3 of the total group).
- Media will be present at the Town Hall and may be in attendance during panel discussions. You should assume that your comments may be quoted at any time.
- Observers may attend the sessions but cannot participate or contribute to discussions.
- The process is as valuable as the recommendations.

Creation of the Draft Recommendations Report

Once complete, the consensus statements are taken from each panel to the Report Chair. The Report Chair reviews the statements from all three panels and looks for consensus across all of the groups. With assistance from the Panel Recorders, the Report Chair creates draft report of what appears to be the consensus of the Town Hall participants.

The draft report is distributed before the plenary session, which takes place o Monday, February 11. Panels meet prior to the start of the plenary session to review the draft and outline any areas the panel wants to address at the plenary session.

Th Plenary Session

At the plenary session, all participants work as full body to approve, amend or reject each section of the report of recommendations.

AG NDA

WEDNESDAY, FEBRUARY 6

7:30 a.m. – 8:00 a.m.	Registration
8:00 a.m. – 9:15 a.m.	Breakfast and Opening Program – Skyline room
	Welcome by Mayor **Jim Lane**
	Opening Comments & Overview: **Tara Jackson**, President, Arizona Town Hall; **Alberto Olivas**, Director, Center for Civic Participation, Maricopa Community Colleges; **Jim Condo,** Attorney, Partner, Snell & Wilmer, L.L.P.; **Scott Rhodes**, Managing Attorney, Jennings, Strouss & Salmon, PLC; **Mike Widener**, Attorney Of Counsel, Bonnett, Fairbourn, Friedman & Balint; and Youth Town Hall Representatives **Zachary Reinstein** from Pinnacle High School and **Ayanna Siders** from Arcadia High School
9:30 a.m. – 12:00 p.m.	Panel Discussions (coffee break and snacks mid-morning)
	Panel Hedgehog – Skyline Alberto Olivas, *Chair* Will Voit, *Recorder*
	Panel Ocotillo – Phoenician Jim Condo, Chair Jennifer Frownfelter, Recorder
	Panel Saguaro – Silverado Mike Widener, Chair Scott Rhodes, Recorder

THURSDAY, FEBRUARY 7

7:30 a.m. – 8:00 a.m.	Continental Breakfast
8:15 a.m. – 12:15 p.m.	Panel Discussions (coffee break and snacks mid-morning)
12:30 p.m. – 1:30 p.m.	Buffet Luncheon

MONDAY, FEBRUARY 11

7:30 a.m. – 8:30 a.m.	Individual panel caucuses (Continental Breakfast) **Panel Hedgehog** – Skyline **Panel Ocotillo** – Phoenician **Panel Saguaro** – Silverado
8:45 a.m. – 12:15 p.m.	Plenary Session – All Participants *Presiding*: **Ron Walker**, Board Chair, Arizona Town Hall Adoption of Recommendations
12:30 p.m. – 1:30 p.m.	Lunch
	ADJOURNMENT

BIOGRAPHIES: TOWN HAL FACILITATORS

Jim Condo (Chair, Panel Ocotillo)

Jim is an Attorney and Partner at Snell & Wilmer L.L.P., where he has a national and regional trial practice concentrated in complex commercial, professional liability defense and product liability litigation. He serves as co-chair of Snell & Wilmer's Commercial Litigation Practice Group and also holds the position of Primary Loss Prevention Partner with responsibility for counseling the firm's lawyers in professional liability matters.

Jim has been associated as a volunteer with the Arizona Town Hall for more than 25 years, including having served as Chairman of the Board in 2007-2009. He also has been selected as a Fellow, Litigation Counsel of America (2012), as well as being included in various rankings of outstanding attorneys in business litigation.

Jennifer Frownfelter (Recorder, Panel Ocotillo)

Jennifer is the Vice President of URS Corporation in Phoenix. She attended the University of Colorado (B.S.-Biology, Environmental Conservation), and Duke University (M.P.P.-Public Policy; M.E.M-Environmental Management).

She is currently member of Arizona Association of Environmental Professionals and Valley Forward Energy Committee. She is past volunteer at the National Park Service, and Desert Botanical Garden in Phoenix.

Tara Jackson (President, Arizona Town Hall)

Tara has served as President of the Arizona Town Hall since July of 2006 and recently completed a term as Chair of Project Civil Discourse.

Prior to joining the staff of Arizona Town Hall, Ms. Jackson practiced law in the area of employment and commercial litigation for sixteen years with the Phoenix firm Bonnett, Fairbourn, Friedman and Balint.

Tara has taught as an Adjunct Professor for ASU's Law School and has served in numerous positions for both state and federal bar associations. Arizona's federal judges appointed her to serve as a Lawyer Representative for the Ninth Circuit and, in 2005, selected her to co-chair Arizona's delegation. She also has served on the Merit Selection Panels for the appointment and reappointment of United States Magistrate Judges and several Advisory Boards for ASU.

Tara has been "Big Sister" for Valley Big Brothers/Big Sisters and a mentor and family sponsor for Homeward Bound. She has assumed various leadership roles for Soroptimist International of Phoenix, including President in 2002-2003. She and her husband have five teenage children.

BIOGRAPHIES: TOWN HALL FACILITATORS (Cont.)

Alberto Olivas (Chair, Panel Hedgehog)

Alberto is the Director of the Maricopa Community Colleges Center for Civic Participation. Originally from Sierra Vista, he has degrees from Arizona State University (B.A. Anthropology) and Northern Arizona University (M.Ed.)

He is currently Chair of the board of directors for Kids Voting Arizona, and also serves on the boards of directors for Arizona Town Hall, Valley Leadership and the Mesa Association of Hispanic Citizens. He is a graduate of the inaugural class of the Flinn-Brown Arizona Civic Leadership Academy, and of the Valley Leadership, Tempe Leadership and Mesa Leadership programs. He is a past Vice President of the Arizona Hispanic Chamber of Commerce, and previously served as Director of the Governor's Office of Equal Opportunity, as Voter Outreach Director for Secretary of State Betsey Bayless, was appointed to the Arizona Commission of Indian Affairs, and participated in the U.S. delegation to Moscow for the 2008 Dartmouth Conference.

Michael Minnaugh (Report Chair)

Michael is an experienced trial attorney with Righi Law Group. His practice focuses on commercial litigation and construction law. He has represented owners, developers, general contractors, subcontractors, material suppliers, sureties and design professionals. He is a frequent speaker and author on wide range of construction issues. He serves as an executive board member of the Arizona State Bar Construction Law Section. He is also a member of the Arizona Registrar of Contractors Industry Advisory Council and Construction Financial Management Association. He is involved with the Juvenile Diabetes Research Foundation and the Boys and Girls Club. He has been a Recorder for Arizona Town Hall. He earned his undergraduate degree from Georgetown University in 1999 and his J.D. from The Catholic University of America in 2002.

Scott Rhodes (Recorder, Panel Saguaro)

Scott is Managing Attorney of Jennings, Strouss Salmon, P.L.C. A substantial part of his practice focuses o representing lawyers in lawyer discipline proceedings and counseling lawyers and law firms on issues related to legal ethics and the law of lawyering. The Best Lawyers in America®named Scott as the 2011 Administrative Lawyer of the Year in Phoenix. He also has been selected for inclusion in 2011-2012 Southwest Super Lawyers in the categories of Professional Liability, Defense, Government/Cities Municipalities, and Utilities Law. In 2011, the Arizona Supreme Court appointed Scott to serve o its Attorney Regulation Advisory Committee, which makes recommendations regarding attorney examination, admissions, reinstatement, disability and the lawyer discipline process. Scott was the co-recipient of the State Bar of Arizona's 2010 Member of the Year Award. He was Chair of the Ethics Committee of the State Bar of Arizona from 2009-2011, and was member of the Arizona Supreme Court Attorney Discipline Task Force from 2009-2010.

Scott is the Board Chair Elect for Arizona Town Hall.

BIOGRAPHIES: TOWN HALL FACILITATORS (Cont.)

Will Voit (Recorder, Panel Hedgehog)

Will is an associate attorney in Lewis and Roca's Litigation Practice Group. He assists clients in a broad range of litigation matters, with specific expertise in product liability and insurance defense, class actions, and appeals of all kinds.

He also has substantial experience representing clients in Arizona's state and federal trial courts. Among his successful representations, Willhas helped to obtain the denial of class certification and the substantial dismissal of a consumer fraud and racketeering lawsuit against a nationwide franchisor. He obtained complete dismissal of a multi-state class action against a national construction company and its regional subsidiaries. He also served on the trial team defending a major tire manufacturer in a month-long product liability trial, which resulted in a complete defense verdict.

While in law school, Will was Executive Editor of the Alaska Law Review and winner of Duke's Dean's Cup moot court tournament. He has volunteered many times for the Arizona Town Hall, most recently as its Report Chair, and he currently serves on its Education and Training Committee.

Ron Walker (Plenary Chair)

Ro has recently retired from the position of Mohave County Manager, a position he held since 2001. Born in Greenville, Texas, he attended National University (MBA), the University of Southern California (MS) and Texas A&M (BS). He is retired Captain in the U.S. Navy where he spent 26 years and retired in 1994.

Ro is the Board Chair for Arizona Town Hall.

Mike Widener (Chair, Panel Saguaro)

Mike is an attorney with the law firm of Bonnett, Fairbourn, Friedman & Balint P.C. He has been Of Counsel to the firm since May 2008, after being shareholder and director of the firm. He entered private law practice in 1983, where he has practiced in the areas of real property, land use, and administrative and governmental relations law.

Mike received his J.D. from the University of Arizona, M.S. from the University of Illinois, and B.A. from the University of Virginia. He is an adjunct law professor at the Phoenix Law School.

His community engagements include being a Director of the Maricopa County Justice Museum and Learning Center, the past President of the Saint Mary's High School Scholarship and Benefit Fund, past President of the Board of Trustees of the Orangewood Presbyterian Church of Phoenix, a past member of the steering committee of the University of Virginia Club of Phoenix, and past Chair of the Catania, Italy, Committee of the Phoenix Sister Cities (and a former Director of the Sister Cities' Board). Mike presently volunteers as a zoning adjustment hearing officer for the City of Phoenix. He has lived since 1972 in Flagstaff, Prescott, Tucson and, primarily, Phoenix.

VISIONING SCOTTSDALE TOWN HALL PARTICIPANTS

LAST	FIRST	TITLE
Alford	Dave	President Parada Del Sol
Alisopp	Phil	CEO, Transpolis Global
Anderton	Wendy	Operations Director, Kyle Moyer & Company
Andrews	Andy	Executive Director, DC Ranch Association
Badenoch	Patty	Ret. Artist
Bailey	Ace	Owner Ultimate Art & Cultural Tours; Concierge Hotel Valley Ho
Bankofier	Todd	Partner, Fairmont Capital Group
Barnes	Kathe	PCAM, Executive Director, Scottsdale Ranch Community Association
Baron	Joan	Owner, Baron Studio
Blommel	Denise	Attorney, Denise Blommel, PLLC
Brown	Denny	VP Scotts Unified School District Governing Board
Burstein	Karen	Researcher & Business Owner
Camp	Bill	Ret. CEO, Banner Research
Cantor	Nancy	Ret. News Editor/Writer
Cappel	Robert	Ret. Director Worldwide Health Safety & Environmental, Eastman Kodak
Cartier	Dawn	Transportation Engineer, CivTech Inc.
Cavanaugh	Michael	VP Quality Tri-West Health Care
Chippindall	Andrew	General Manager, Hotel Valley Ho
Cisar	Alan	Ret. Senior Account Executive, Brinks Armored Car Service
Coe	Laurie	Realtor, Homesmart
Corbett	Larry	Presbyterian Minister
Day	Roger	Sales, Phoenix Motor Company/Mercedes Benz of Scottsdale
Dorsett	Lynn	Ret. Project Manager, Technical Sales, IBM
Drake	Betty	Planning & Urban Design Consultant; Drake & Associates
Edelman	Mark	Manager, AZ State Land Dept; Planning & Engineering Services
Falduto	Laura	Psychologist, Owner, Center for Well Being
Fenton	Martha (Marti)	Homemaker
Flanagan	Kerry	I T Director, DHL
Foote	Janet	Assistant Professor, University of Arizona
Freshman	Floris	Realtor, Artist, Singer
Fudala	Joan	Owner, Joan Fudala Scottsdale Historic Consulting
Gaines	Elie	Owner, All Schools Considered; School Search Consultant
Galli	Joe	Executive Director, North Scottsdale Chamber
Gillenwater	Troy	Realtor, Russ Lyon Sotheby's International Realty
Golston	Syd	Education Administrator, Phoenix Union HS District
Gulick	Melinda	VP Marketing, DMB Associates
Haedicke	John	Owner, Arena Consulting Group
Hall	Melvin	Professor at Northern Arizona University
Hameed	Azim	Lawyer, Sherman & Howard, LLC

LAST	FIRST	TITLE
Harden	Mary A.	Ret. Registered Nurse
Hardin	Donna	Administrative Assistant, Fender Musical Instruments
Hecker	Doug	Consultant/Mentor, 2 Excel Now, LLC
Heitel	James	Real Estate Management, Estates Property Development, Ltd.
Hink	John	Attorney, Lewis and Roca, LLP
Howard	Bill	Former Sr VP Motorola; Sandia; Xilinx, Professor
Jasa	Paul	Engineer
Joyner	Michal Ann	Private Mortgage Banker, Wells Fargo Home Mortgage
Kelly	Mike	Ret. Lt Col USMC
Kidder	Rick	President & CEO, Scottsdale Area Chamber
Kirtley	Sonnie	Ret. Real Estate Broker
Larson	Jane	Business Writer/Editor
LaSpisa	Sabrina	Project Manager/Environmental Scientist, Conestoga-Rovers & Associates
Ma	Nang	Registered Architect, Phx Architecture
McLendon	Marna	Attorney, Prosecutor, AZ Attorney General
Michaelson	Brad	Owner, Runway 21 Studios, Inc.
Miller	Michael	President, Miller & Associates Environmental Brokers, Inc.
Moll	Connie	Veterinarian, Midland Animal Clinic
Montiel	Isabel	Yavapai Elementary School
Moulton	James	Director of Program Management
Myers	Howard	Ret. Electrical Engineer, Sensor Technologies & Systems
Nau	Jude	Owner, Sundial Hotel
Nelson	Scott	Owner, Fashion Square
O'Hearn	Ned	Commercial Real Estate Broker, Boulders Realty Advisors
Pabis	Michelle	Government Relations Director, Scottsdale Healthcare
Paetzer	Suzanne	Executive Coach, Lee Heckt Harrison
Parnian	Leila	Vice President, Parnian Furniture
Phillips	Joanne "Copper"	Owner, Educational Consultant, Education Cadre, LLC
Randolph	Paula	Manager, Sonoran Institute
Rau	Jane (Hattie)	Ret., Master Steward & Trail Builder for MSC
Reynolds	Joey	Flight Attendant Southwest Airlines
Rice	JoAnn	Ret. Business Owner
Richman	Marvin	Ret. President, Olympia & York Developments Corp.
Riggins	April	Arizona Design Consultant, Construction Solutions
Rodgers	Laraine	Ret., Former CIO, Xerox, City of Phoenix, Avon Products, Inc.
Rogers	Bob	Ret. Public Policy Council, Siemens Corporation
Russell	Dan	Ret. Executive VP, Wells Fargo Home Mortgage
Schaffner	Chris	Account Executive, FORBO
Schweikert	Bill	President, General Modular Industries
Semenchuk	Dan	Founder, Creative Connect
Sisley	Sue	Physician; Asst Professor, University of Arizona College of Medicine
Smith	Randall	Ret. Sr. VP, Universal Technical Institute, Inc.
Sonnier	Leslie	Sales, Financial Protection, Family Heritage
Springborn	Wendy	Engineering Services Manager, City of Tempe

LAST	FIRST	TITLE
Stratton	Tim	Lawyer, Gust & Rosenfeld, PLC
Strohan	James	Ret. President, For Your Benefit, Inc.
Sydnor	Douglas	Architect, Douglas Sydnor Architect and Associates, Inc.
Trujillo	Guy	Investment Advisor, Financial Directions, LLC
Unger	Frederick	Real Estate Developer, Spring Creek Development
Walters	Sabrina	Owner, Broker, Realtor, SLW Realty Group
Washington	John	Automotive Design, Reaction Research, Inc.
West	Sam	Architecture & Planning, SJW III, Architect, Ltd.
White	Tim	Leader, Project Management-Americas, Honeywell Building Solutions
Whitehead	Linda	Ret. The Travelers and Citigroup
Winter	Aron	VP Sales & Marketing, Pro-Tech Products
Wisda	James	Ret. Senior Vice President, Pardee Homes
Young	Coreen	Ret. consultant, community education and public information
Zapernick	Lois	Real Estate; Russ Lyon Sotheby's International Realty

PANE ASSIGNMENTS
VISIONING SCOTTSDALE TOWN HALL

PANEL HEDGEHOG

Alberto Olivas ***Chair***
Will Voit, ***Recorder***

Dave Alford
Phil Alisopp
Patty Badenoch
Ace Bailey
Denise Blommel
Nancy Cantor
Alan Cisar
Laurie Coe
Roger Day
Laura Falduto
Elie Gaines
Melinda Gulick
John Haedicke
Melvin Hall
Mary Harden
James Heitel
Bill Howard
Paul Jasa
Mike Kelly
Jane Larson
Sabrina LaSpisa
Michael Miller
Ned O'Hearn
Suzanne Paetzer
Hattie Rau
Joey Reynolds
Bob Rogers
Dan Russell
Sue Sisley
Leslie Sonnier
Tim Stratton
Fred Unger
Sam West

PANEL OCOTILLO

Jim Condo ***Chair***
Jennifer Frownfelter, ***Recorder***

Wendy Anderton
Todd Bankofier
Kathe Barnes
Joan Baron
Karen Burstein
Dawn Cartier
Larry Corbett
Mark Edelman
Kerry Flanagan
Joan Fudala
Joe Galli
Troy Gillenwater
Azim Hameed
Donna Hardin
Michal Ann Joyner
Nang Ma
Brad Michaelson
Connie Moll
James Moulton
Howard Myers
Jude Nau
Scott Nelson
Leila Parnian
Copper Phillips
April Riggins
Bill Schweikert
Randall Smith
Wendy Springborn
Doug Sydnor
John Washington
Aron Winter
Coreen Young

PANEL SAGUARO

Mike Widener ***Chair***
Scott Rhodes, ***Recorder***

Andy Andrews
Denny Brown
Bill Camp
Robert Cappel
Michael Cavanaugh
Andew Chippindall
Lynn Dorsett
Betty Drake
Marti Fenton
Janet Foote
Floris Freshman
Syd Golston
Doug Hecker
John Hink
Rick Kidder
Sonnie Kirtley
Marna McLendon
Isabel Montiel
Michelle Pabis
Paula Randolph
JoAnn Rice
Marvin Richman
Laraine Rodgers
Chris Schaffner
Dan Semenchuk
James Strohan
Guy Trujillo
Sebrina Walters
Tim White
Linda Whitehead
James Wisda
Lois Zapernick

DISCUSSION OUTLINE
VISIONING SCOTTSDALE TOWN HALL

SESSION I - WEDNESDAY MORNING – FEBRUARY 6

SETTING THE STAGE AND COMMUNITY VALUES

1. What are the best features of Scottsdale? How can Scottsdale capitalize on its best features while meeting the needs of the future?

2. For the next set of questions, consider the 200 General Plan Community Values (page 1 of the Visioning Workbook) and the community that you envision for Scottsdale in 2040. ***(Discussion of this question will be continued during Session II.)***

   What community values, if any, should be retained in the 2014 General Plan with no changes?

   What community values, if any, should be completely eliminated in the 2014 General Plan?

   What community values, if any, should be retained in a modified form? If a community value should be retained in a modified form, how should it be modified?

   What community values, if any should be added to the 2014 General Plan?

   * *Consider results of Future Leaders Town Hall.*

SESSION II –THURSDAY MORNING – FEBRUARY 7

COMMUNITY VALUES AND ESTABLISHING A VISION FOR THE FUTURE

1. ***(Continue discussion of question 2 from Session I).***

2. What should the General Plan Vision Statement be for the 201 General Plan?

SUMMARY OF FUTURE LEADERS' TOWN HALL RECOMMENDATIONS

Scottsdale's Best Features

Scottsdale's best features are its beautiful natural environment and its arts and cultural amenities. The charm of old town, the uniqueness of its southwestern heritage, the trolley system, well-maintained parks, art events and diverse businesses have "something for everyone" which appeals to residents and tourists alike. The sense of community, safe neighborhoods and quality roads add to its appeal.

Community Values

(The summary below is redlined version of recommended changes to the existing Community Values.)

In the year 2025, Scottsdale will be a community that:

- Demonstrates its commitment to improving environmental, economic, and social sustainability ~~and measures~~ through expanded recycling programs, support for alternative energy and reduction of fossil fuel use. It will also measure both the short and long-term impacts of our decisions;
- Creates, revitalizes, and preserves neighborhoods that have long-term viability, unique attributes and character, livability, safety connectivity to other neighborhoods in the community, and that fit together to form an exceptional citywide quality of life (i.e. the whole is greater than the sum of its parts);
- Facilitates human connection by anticipating and locating facilities and infrastructure that enable human communication and interaction and reduce isolation; providing ample opportunities for youth; increasing community service and civic engagement and by promoting policies that have a clear human orientation, value and benefit;
- Respects the environmental character of the city with preservation of desert and mountain lands, and innovative ways of protecting natural resources, clean air, water resources, natural habitat and wildlife migration routes, archaeological resources, vistas, and view and scenic corridors;
- Builds o its cultural heritage, promotes historical and archaeological preservation areas, and identifies and promotes the arts and tourism in way that recognizes the unique desert environment in which we live;
- Coordinates and publicizes transportation options with appropriate land uses to enable a decreased reliance o the automobile, ~~and~~ more mobility choices, and more accessible and varied public transportation options;
- Maintains or improves its high standards of appearance, aesthetics, public amenities, and levels of service;
- Recognizes and embraces change: from being predominantly undeveloped to mostly built out, from a young town to a maturing city, from a bedroom community to a net importer of employees, and from focus on single economic engine to diverse, balanced economy with an emphasis on supporting small, locally owned businesses;

- Simultaneously acknowledges our past (preservation of historically significant sites, ~~and~~ buildings and neighborhoods, and our western heritage will be important), and prepares for our future by emphasizing the use of older structures for future needs and supporting local cultural activities;
- Promotes growth that serves community needs, quality of life and community character;
- Recognizes and embraces the diversity of the community by creating an environment that respects community cohesiveness and the human dignity of all without regard to race, religion, national origin, age, gender, sexual orientation, or physical attributes.
- Promotes excellent, diverse and innovative educational opportunities.

SGP 2014 SCOTTSDALE GENERAL PLAN

your plan, your future

ARIZONA TOWN HALL
Creating Solutions

One East Camelback, Suite 530, Phoenix, Arizona 85012
Phone 602-252-9600 Fax: 602-252-6189
Website: www.aztownhall.org

Report of the
VISIONING SCOTTSDALE TOWN HALL
Scottsdale, Arizona
February 6, 7 and 11, 2013

Introduction

As one of the first steps in a broad public outreach effort to develop a comprehensive 2014 General Plan, the Scottsdale City Council worked with the nonprofit Arizona Town Hall to produce a Visioning Scottsdale Town Hall. The goal was to actively engage the participants in helping to guide the future of Scottsdale.

Approximately 100 community leaders, business owners and residents participated in three half-days of respectful and vigorous civil discourse. The participants were selected as part of an extensive application process designed to represent a diversity of interests, viewpoints and geographic locations within the city. Although not every participant agreed with every point set forth in this report, this report represents the general consensus of those attending the Town Hall.

Scottsdale's Best Features

Scottsdale represents established tradition and robust community. Scottsdale is a sophisticated city with a small town feel.

Scottsdale takes great pride in creating a sense of community among its residents. Indeed, Scottsdale's most valuable assets are its citizens and the opportunities available for citizens to participate in the decision process and to contribute to the community.

Scottsdale appeals to visitors, business owners and residents of all ages. Scottsdale balances the beauty of its natural environment with a high quality of life, and the vibrancy of big events and ideas. Some of Scottsdale's best features include: our McDowell Sonoran Preserve, the Indian Bend Wash Greenbelt, great weather; open skies; beautiful views; worldwide prestige; safe neighborhoods with diverse housing and lifestyle choices; a diverse economy that includes a variety of corporate and locally-owned businesses; varied entertainment and dining opportunities; arts and cultural venues; shopping districts; easy and affordable access to preserves, parks and recreation; and a walkable and vibrant downtown. Other best features include Scottsdale's cleanliness and the commitment and dedication of City employees.

Scottsdale is also internationally renowned for its healthcare resources, modernized baseball facilities, equestrian facilities, arts and culture venues, commitment to quality educational standards, the unique Southwestern Sonoran Desert environment, the Indian Bend Wash Greenbelt, and our McDowell Sonoran Preserve.

For residents and tourists alike, hospitality is a key component of Scottsdale's attractiveness, with nationally and internationally recognized events.

These features truly make Scottsdale America's most livable city.

Capitalizing on Scottsdale's Best Features

Scottsdale must continue to function and thrive while maintaining its character. Scottsdale should continue to foster its business communities with incentive-based programs while balancing a continued respect for unique neighborhoods and the environment. Scottsdale should also continue to create an environment that encourages professionals of all ages to stay in Scottsdale by maintaining quality educational systems, encouraging collaborative efforts among business leaders and community members, promoting accessible, effective and efficient transportation systems and enhancing incentives for business growth to ensure future economic security and local jobs.

Scottsdale's communities are diverse. The population mix of the Southwest is changing rapidly. It is critical to embrace and encourage evolving community diversity as one tool for promoting enduring, sound, and sustainable growth. To that end, Scottsdale should develop a comprehensive plan to build and improve on existing historic facilities with reuse which is consistent and in context, and with responsible expansion, in a concerted effort to preserve Scottsdale's character and Southwestern culture.

We should also continue our commitment to citizen participation, open dialogue and big ideas. We should capitalize on building our business community and educational resources by leveraging our citizens' high educational attainment. We should be guided by an emphasis on innovation, entrepreneurship, and the technological infrastructure needed to integrate education and other facilities, such as libraries, that promote greater access to information. We should promote schools of excellence and diverse and innovative life-long educational opportunities.

Scottsdale is blessed with magnificent natural beauty. The McDowell Sonoran Preserve, Indian Bend Wash Greenbelt and the Scottsdale Civic Plaza, among others, create an attraction for visitors and special comfort for Scottsdale's residents. Scottsdale is committed to providing infrastructure to enhance accessibility to significant locations, such as the canal, and activities throughout Scottsdale.

Tourism is a major contributor to Scottsdale's economic base and its ability to employ many people with varying backgrounds, which supports Scottsdale's development. Tourism must receive continued support.

Global connectivity is provided by Scottsdale Airport and Airpark, and global appeal by facilities like WestWorld and other amenities. To further capitalize on its best features and with an eye to the future, Scottsdale should pledge to emphasize collaboration among all members of the community and neighboring communities with particular focus on encouraging the engagement of our youth, and on being a city where citizens actively participate in city government and its process resulting in decisions that benefit both their neighborhoods and the city as a whole.

Community Values

In 2045 Scottsdale will be a community that:

- Expects responsive, just, efficient and transparent governance of all of our community values through strong visionary leadership, continuous partnerships and engaged citizenry.

- Demonstrates its commitment to environmental, economic, social well-being and educational quality by vigorously evaluating both the short- and long-term impacts of its decisions prior to making those decisions;

- Creates, revitalizes, protects, and preserves neighborhoods, unique attributes and character, livability, safety, and accessibility to and connectivity with other neighborhoods in the community in a manner that fits together to form an exceptional citywide quality of life;

- Facilitates human connection across neighborhood, cultural, geographic and generational boundaries to make Scottsdale one community by promoting policies and by anticipating and locating facilities, technology, infrastructure, and transportation that have a clear value and benefit;

- Respects the Southwestern environmental character of the city, our McDowell Sonoran Preserve and our Sonoran Desert surroundings as key assets by innovatively collaborating with neighboring cities and Native American communities to preserve, protect and effectively manage natural resources;

- Encourages activities and infrastructure that promote a culture of wellness and lifelong physical and mental health and well-being for residents, visitors and employees;

- Recognizes and builds on the continuing evolution of its Southwestern and diverse heritage and cultures, promotes historical and archaeological preservation areas, and identifies, promotes and celebrates the arts and tourism in a way that recognizes the unique Sonoran Desert environment in which we live;

- Promotes, coordinates and communicates cost-effective, diverse, affordable and innovative local and regional transportation options with appropriate land uses and more mobility choices, balancing both the present needs of our community and the need to adapt to changing modes of transportation that provide choices to the whole population, including Scottsdale residents, those who commute into and out of Scottsdale and those who visit the city;

- Maintains or improves very high standards of appearance, public amenities, safety, service, wellness, education and human capital;

- While supporting and maintaining the unique qualities, characteristics, and identity that make Scottsdale special, anticipates, proactively manages, and embraces change that is consistent with our values, contributes positively to the future that the citizens of Scottsdale envision, and positions Scottsdale to meld the benefits of its historic past with its present realities and future needs, including embracing a range of quality housing options and evolving economic, employment and educational opportunities;

- Celebrates and respects our past through the preservation of our multicultural and Southwestern heritage, and preservation of historically and archeologically significant sites, buildings and neighborhoods, while continuing to prepare and plan for our future;

- Encourages appropriate land use, quality redevelopment, transitions between communities compatible with surrounding neighborhoods, and the development of communities that are vibrant and attractive for various ages and income levels;

- Supports community cohesiveness and creates a welcoming environment by respecting the human dignity of all, recognizing and embracing cultural and economic diversity throughout the City of Scottsdale and the region;

- Promotes and enhances a diverse and balanced economy that is sustainable, creative, innovative, supportive of entrepreneurs and local business owners and integrated with educational institutions and that strengthens arts and cultural industries as a key element in the growth of Scottsdale's economy;

- Encourages safe and active living, and the redevelopment, planning and design of new environments, which respond to Scottsdale's best features and support the variety of social and economic needs and values of residents and visitors;

- Takes an engaged visionary leadership role in the development of regional resources for education, transportation, public safety, healthcare, disaster preparedness, and employment to ensure that these are available to residents and visitors to Scottsdale in ways consistent with community values;

- Promotes and nurtures regional, tribal, national and global collaboration, cooperation and partnerships that enhance education, research, the economy and the environment, specifically to include neighboring Indian communities;

- Promotes excellent, diverse and innovative life-long educational opportunities;

- Actively embraces community involvement, and makes citizens true partners in the decisions that affect their neighborhood and the city as a whole. We will celebrate, support, respect and nurture civic engagement, community service and volunteerism;

- Showcases and expands Scottsdale's wonderful system of libraries, parks and recreation programs and does even more to make them available to all citizens;

A Vision for the Future

The community values set forth above are an integral part of this vision statement and are incorporated herein.

We will be a city founded on and adhering to its community values, which leverages its rich Southwestern history, where the past is celebrated, while managing our future based on preserving those values. We will be an active, globally interconnected, and multi-generational city where residential neighborhoods and commercial districts co-exist harmoniously with each other and the environment; where a culture of wellness is promoted; where people are committed to and respect each other; and where growth is managed responsibly and with respect for nature, sustainability, well-being, character, and unique environmental assets such as our Sonoran Desert and our McDowell Sonoran Preserve. We will be a vibrant and welcoming city with a unique international reputation for natural beauty, innovation, arts and culture, economic vitality, and livability.

We will continue to create a safe, attractive, vibrant and sustainable city for ourselves, our children, our visitors and future generations.

We will be a city where citizens are esteemed active primary stakeholders in their city government.

We will preserve, protect and enhance neighborhoods, and historically significant structures and sites, while protecting property rights.

We will be a city that draws visitors from around the world because of its internationally recognized brand reflected in its physical appearance; desert vistas; amenities; world-class events; resorts;

equestrian heritage; high quality of life; healthcare resources; thriving, unique and walkable downtown; and its arts, culture and recreation opportunities.

We will create an innovative and sustainable city that is economically prosperous, an honest place to do business and that allows a multitude of opportunities for all citizens.

We will create, grow and attract diverse, world-class businesses and entrepreneurs that leverage technology and innovation to fuel the local community and benefit the global economy.

We will have a thriving, well-educated workforce; strong, safe neighborhoods; and a wide range of innovative, efficient and effective mobility options that connect to citywide and regional networks.

We will be a city that promotes meaningful open spaces with new development and that respects and preserves Scottsdale's mature neighborhoods, the Indian Bend Wash Greenbelt, canal banks, neighborhood parks, and a thriving downtown.

We will be one of the finest cities in which to live and a place where the Southwest and the 21st Century join hands.

PROPOSAL SIGNATURE PAGE	
	GENERAL PLAN UPDATE VISIONING **RFP # 13RP005**

The undersigned hereby offers and agrees to furnish the material, or service, in compliance with all the terms and conditions, instructions, specifications, and any amendments contained in this Request for Proposal document and attached City Services Contract and any written exceptions in the offer accepted by the City.

The Offeror also certifies it is in compliance with the Non Collusion, Contracts with Sudan and Iran, and the Immigration Compliance and Federal and Arizona State Immigration Laws requirements of the solicitation.

Arizona Town Hall	
Company Name	Signature of Authorized Person
One East Camelback, #530	Tara Jackson
Address	Printed Name
Phoenix AZ 85012	President
City State Zip	Title
602-252-9600	602-252-6189
Telephone Number	Fax Number
9-11-12	tarajackson@aztownhall.org
Date	E-Mail Address

Proposal must be signed by a duly authorized representative eligible to sign contract documents for the firm. Consortiums, joint ventures, or teams submitting proposals will not be considered responsive unless it is established that all contractual responsibility rests solely with one contractor or one legal entity. The Proposal must indicate the responsible entity.

Offerors should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance

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One East Camelback, #530	Tara Jackson
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602-252-9600	602-252-6189
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Offerors should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance

REFERENCES

GENERAL PLAN UPDATE VISIONING

RFP # 13RP005

List minimum of three (3) Arizona customers, excluding the City of Scottsdale, for whom your company has provided service(s) of a similar scope as this Invitation for Bid, during the past three years. Include the length of any contracts listed. Bidders may make multiple copies of this document as needed.

The following questions are asked to enable the evaluation team to assess the qualifications of bidders under consideration for final award. This information may or may not be a determining factor in award of this Solicitation.

Company Name: Town of Marana

Company Address: 11555 W. Civic Center Dr.

City/State/Zip: Marana, AZ 85653

Contact Person: Gilbert Davidson Tel ephone #: 520-382-1999

Email: sandersm001@superiorcourt.maricopa.gov Date of Ser vice: 06/04/12

Type of Service Provided: Conduct Town of Marana's Citizen Forums & supporting activities.

Company Name: Arizona Association of School Business Officials

Company Address: 2100 N. Central Ave., Suite 202

City/State/Zip: Phoenix AZ 85004

Contact Person: David Lewis Tel ephone #: 602-253-5576

Email: dlewis@aasbo.org Date of Ser vice: 06/12/12

Type of Service Provided: Consulting & facilitation of leadership forum Steering Committee meeting

Company Name: Arizona Association of Family & Conciliation Courts

Company Address: 3131 W. Durango St., Ste. 2245

City/State/Zip: Phoenix, AZ 85009-6269

Contact Person: Judge Colleen McNally Tel ephone #: 602-506-5961

Email: sandersm001@superiorcourt.maricopa.gov Date of Ser vice: 01/24/12

Type of Service Provided: Facilitation of Town Hall style discussions at Annual Conference.

YOUR COMPANY NAME: Arizona Town Hall

REFERENCES	
	GENERAL PLAN UPDATE VISIONING **RFP # 13RP005**

List minimum of three (3) Arizona customers, excluding the City of Scottsdale, for whom your company has provided service(s) of a similar scope as this Invitation for Bid, during the past three years. Include the length of any contracts listed. Bidders may make multiple copies of this document as needed.

The following questions are asked to enable the evaluation team to assess the qualifications of bidders under consideration for final award. This information may or may not be a determining factor in award of this Solicitation.

Company Name: Scottsdale Healthcare Medical Center

Company Address: 7351 E. Osborn Rd.

City/State/Zip: Scottsdale, Arizona 85251

Contact Person: Felicia Prostrollo Tel ephone #: 480-323-4560

Email: fprostrollo@shc.org Date of Ser vice: 01/10/11

Type of Service Provided: Facilitation of Town Hall style discussions.

Company Name: _____

Company Address: _____

City/State/Zip: _____

Contact Person: _____ Tel ephone #: _____

Email: _____ Date of Ser vice: _____

Type of Service Provided: _____

Company Name: _____

Company Address: _____

City/State/Zip: _____

Contact Person: _____ Tel ephone #: _____

Email: _____ Date of Ser vice: _____

Type of Service Provided: _____

YOUR COMPANY NAME: Arizona Town Hall

BIDDER GENERAL DISCLOSURE FORM

GENERAL PLAN UPDATE VISIONING

RFP # 13RP005

Bidder shall respond to each of the questions below by checking the appropriate box and provide supplemental information as needed. Failure to fully and truthfully disclose the information required by this disclosure form may result in the disqualification of your submittal from consideration or termination of the contract, once awarded.

Debarment / Suspension Information – Has the Respondent or any of its principals been debarred or suspended from contracting with any public entity?

☐ YES ☑ NO

If "YES", in an attachment to this form identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

Surety Information – Has the Respondent or any of its principals ever had a bond or surety cancelled or forfeited?

☐ YES ☑ NO

If "YES", in an attachment to this form identify the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.

Bankruptcy Information – Has the Respondent or any of its principals ever been declared bankrupt or filed for protection from creditors under State or Federal proceeding in the last seven (7) years?

☐ YES ☑ NO

If "YES", in an attachment to this form identify the date, court, jurisdiction, case number, amount of liabilities and amount of assets.

Signature	President Title
Tara Jackson Printed Name	09/11/12 Date

COMPANY NAME: Arizona Town Hall

BIDDER LITIGATION DISCLOSURE FORM

GENERAL PLAN UPDATE VISIONING

RFP # 13RP005

Bidder shall respond to each of the questions below by checking the appropriate box and provide supplemental information as needed. Failure to fully and truthfully disclose the information required by this disclosure form may result in the disqualification of your submittal from consideration or termination of the contract, once awarded.

Have you or any member of your Firm or Team to be assigned to this contract ever been indicted or convicted of a felony or misdemeanor greater than a Class C in the last five (5) years?

☐ YES ☑ NO

Have you or any member of your Firm or Team to be assigned to this contract ever been terminated (for cause or otherwise) from any work being performed for the City of Scottsdale or any other Federal, State or Local Government?

☐ YES ☑ NO

Have you or any member of your Firm or Team to be assigned to this contract ever been involved in any claim or litigation with the City of Scottsdale or any other Federal, State or Local Government during the last ten (10) years?

☐ YES ☑ NO

If you answered "YES", to any of the above questions, in an attachment to this form, please indicate the name(s) of the person(s), the nature, and status and/or outcome of the information, indictment, conviction, termination, claim or litigation, as applicable.

	President
Signature	Title
Tara Jackson	9/11/12
Printed Name	Date

COMPANY NAME: Arizona Town Hall

PRICING PROPOSAL FORM	
	GENERAL PLAN UPDATE VISIONING **RFP # 13RP005**

PROJECT COST – Offeror will provide a total not to exceed pricing for your proposal including all reimbursable expenses. The Offeror will include on a separate sheet, in a form determined by the Offeror, an itemization of all pricing (i.e. staffing breakdown indicating personnel classification and hourly costs) used to determine the not to exceed project cost as it relates to the proposed tasks and/or deliverables specified herein, include a manpower loading matrix and a detailed list of any reimbursable expenses. Manpower-loading matrix shall indicate an estimate of the hours and related costs to complete each of the tasks described in this Request for Proposal, and reimbursable expenses. Please also include pricing for additional, optional events in excess of the single event requested.

DESCRIPTION	NOT TO EXCEED PRICING
PROJECT COST – PHASE I – VISIONING EVENT *Inclusive of all expenses*	$ 98,000
PROJECT COST – PHASE II – TENTATIVE COMMUNITY OUTREACH *Inclusive of all expenses*	$
TOTAL PROJECT COST – Phase I plus Phase II	$ 98,000

*****TAXES***

Do not include any use, or federal excise tax in your bid. The city is exempt from the payment of federal excise tax and will add use tax as applicable.

ADDENDA

The bidder hereby acknowledges receipt of and agrees his bid is based on the following Addenda.

ADDENDUM # 1 DATED 9/5/12 ADDENDUM #____ DATED _____

ADDENDUM #____ DATED _____ ADDENDUM #____ DATED _____

NO BID: If no bid please state reason:

_____

COMPANY NAME: Arizona Town Hall

ESTIMATED PROJECT COSTS

Amounts will vary depending on number of participants and length of sessions. For example, a session with 35 participants will only require a Panel Chair and Recorder for 8-12 hours per day. Each additional discussion group requires an additional Panel Chair and Recorder. Once there is more than one discussion group, a minimum of one Report Chair and a Plenary Chair are also required.

TITLE	AMOUNT PER HOUR	NUMBER OF HOURS	RANGE	
			FROM	TO
Project Manager	150.00	50-200	7,500	30,000
Panel Chairs	150.00	20-80	3,000	12,000
Recorders	150.00	20-100	3,000	15,000
Report Chairs	150.00	20-100	3,000	15,000
Plenary Chair	150.00	20-80	3,000	12,000
Office Staff	30.00	50-100	1,500	3,000
SUBTOTAL			**21,000**	**87,000**
POTENTIAL REIMBURSABLE EXPENSES (IF NEEDED)				
Copies (including participant handouts)			100	5,000
Speaker costs			-	5,000
Additional Insurance			-	1,000
TOTAL			**21,100**	**98,000**

ARIZONA TOWN HALL
Creating Solutions for 50 Years!

One East Camelback, Suite 530
Phoenix, AZ 85012

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602.252.9600

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602.252.6189

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townhall@aztownhall.org

website:
www.aztownhall.org

September 11, 2012

HAND DELIVERED
City of Scottsdale
Purchasing Department, Front Desk
9191 E. San Salvador Dr.
Scottsdale, AZ 85258

To Whom It May Concern:

Re: Firm and Staff Qualification Summary Letter
Solicitation #13RP005
Request for Proposal – General Plan Update Visioning

Please consider this letter the Arizona Town Hall's "Firm and Staff Qualification Summary Letter" in response to the City of Scottsdale's General Plan Update Visioning RFP # 13RP005.

Synopsis of the Arizona Town Hall's History

Arizona Town Hall is a non-profit organization. For over 50 years, it has been at the forefront of engaging diverse Arizonans using a process of informed civil discourse that helps solve critical and often divisive issues while also strengthening participants' understanding of and relationships with each other.

The Arizona Town Hall is primarily known for its statewide Town Halls that take place twice a year and involve participants from throughout the state and from diverse professional, political and cultural backgrounds. To date, the Arizona Town Hall has held 100 statewide Town Halls on topics such as education, land use, water, taxes and, most recently, civic engagement.

In addition to the statewide sessions, the Arizona Town Hall convenes 20-40 community outreach programs annually. These programs, which are typically in partnership with civic, business and educational organizations, are designed to educate, engage and empower local communities to solve important policy issues.

Since 2011, the Arizona Town Hall has convened a statewide Youth Town Hall before the regular statewide Town Halls. The Youth Town Hall is held in partnership with student organizations and designed to engage a diverse group of students on the same topic as the statewide Town Hall.

The Town Hall also acts as a consultant to business, government and other organizations who wish to use the Town Hall process to solve issues in a format that promotes robust and respectful dialogue and that produces a consensus-based written report of recommendations. The Arizona Town Hall has had at least one consulting contract annually since 2006 with groups as diverse as the Scottsdale Tourism Development Commission, the Town of Marana, and the Arizona Association of Family and Conciliation Courts.

Copies of the 2010 and 2011 Annual Reports and the 2012-2013 Board Book are included with this submission. Both of these publications provide further information on the breadth and depth of the Arizona Town Hall's work.

Contact Information

Tara Jackson
Arizona Town Hall
One East Camelback, Suite 530
Phoenix, Arizona 85012
602-252-9600
602-252-6189
tarajackson@aztownhall.org
www.aztownhall.org

Previous Experience Performing Similar Work

As noted above, the Arizona Town Hall has a wealth of experience performing work similar to the size and scope of the work identified in this RFP. Similar work ranges from small groups of 10-15 people that take an hour to statewide sessions of 130-180 people that take place over a three and a half day time period. The Town Hall process has also been modified to engage hundreds of people at once in auditorium-type settings. A few relevant examples of consulting arrangements most similar to the pending RFP are summarized below.

1. 2006 Downtown Scottsdale Town Hall

Most notably as it relates to this RFP, the Town Hall was engaged in 2006 by the city of Scottsdale to conduct the Downtown Scottsdale Town Hall as part of the public outreach for the comprehensive update to Scottsdale's 1984 Downtown Plan. Tara Jackson, Arizona Town Hall's current President, was the person in charge of organizing and conducting the Downtown Scottsdale Town Hall on behalf of the Arizona Town Hall.

The role of the Arizona Town Hall included: consultation with the city of Scottsdale and its residents on the issues; preparing applications for participation; all aspects of selecting a diverse group of 100 Scottsdale residents to participate in the three day Town Hall process; consultation with Scottsdale staff to determine background documents for participants; drafting of discussion question for participants; media relations; recruitment and supervision of highly-trained volunteers to facilitate and record the discussions using the Town Hall consensus process; and, preparation of the final report of the Downtown Scottsdale Town Hall.

The original and actual cost of the 2006 Downtown Scottsdale Town Hall was $30,000.

The project took place from July 2006 to November of 2006, with the actual Town Hall session taking place November 15, 16 and 20, 2006.

Tara Jackson from the Arizona Town Hall worked principally with Erin Perreault De Perez and John Lusardi from the city of Scottsdale. The city of Scottsdale would have their most recent contact information.

2. Tucson Regional Town Hall

In 2007, Arizona Town Hall worked with the Southern Arizona Leadership Council (SALC) and other business and civic partners in Southern Arizona on the Tucson Regional Town Hall.

The role of the Arizona Town Hall included: consultation with the SALC and related groups on the issues to be addressed; preparing applications for participation; all aspects of selecting a diverse group of 165 Tucson-area residents to participate in the three and a half day Town Hall from over 800 applicants; consultation to determine background documents for participants; drafting of discussion question for participants; media relations; recruitment and supervision of highly-trained volunteers to facilitate and record the discussions using the Town Hall consensus process; preparation of the final report of the Tucson Regional Town Hall; and community presentations on the results of the Town Hall. The success of this event was recognized by the Metropolitan Pima Alliance with its 2007 Award of Distinction.

The original and actual cost of the 2007 Tucson Regional Town Hall was $50,000.

The project took place from December 2006 through the spring and summer of 2007 with the actual Town Hall session convening May 6-9, 2007. For more information visit http://tucsontownhall.org/home

Tara Jackson from the Arizona Town Hall worked principally with Peter Likens, President Emeritus of the University of Arizona and Chair of the Tucson Regional Town Hall and Ron Shoopman, President of the Southern Arizona Leadership Council. Their contact information is as follows:

Peter Likins
6550 E. Marta Hillgrove
Tucson, AZ 85710
Work Phone: (520) 850-3336
E-Mail: plikins@arizona.edu

Ronald Shoopman
Southern Arizona Leadership Council
4400 E. Broadway Ste. 307
Tucson, AZ 85711
Work Phone: (520) 327-7619
E-Mail: rshoopman@salc.org

3. Arizona Statewide Town Halls

To date, Arizona Town Hall has held 100 statewide Town Halls on critical policy issues facing the state. Each Town Hall is supported by a vast array of partners and stakeholders who work under the guidance of the Arizona Town Hall to convene the gathering, prepare and publish research and recommendation reports, and implement the recommendations emanating from the Town Hall. Copies of final reports from the fall 2010 and spring 2011 Town Halls are included with this submission. These reports list the participants, sponsors, speakers and volunteers involved in each of the Town Halls. The reports also contain a

listing of the topics of all Town Halls as of the date of the report. Final reports from the fall 2011 and spring 2012 Town Halls are in the process of being printed. However, electronic copies of the reports can be downloaded from the Town Hall's website and summaries of the reports are included with this submission.

The role of the Arizona Town Hall in holding these statewide sessions includes: consultation with a research team to provide a background report and oversight of the production of the report; training of all facilitators and recorders; selection of participants from around the state, with an emphasis on obtaining a diverse mix of Arizonans; media and public relations relating to the Town Halls; obtaining national and local speakers for the meal sessions; all logistics, including hotel and meeting space accommodations; correspondence with all participants; preparation and publication of the final report and summary reports; dissemination of the reports and recommendations to elected leaders, the media, business and other stakeholders; fundraising for the sessions; staffing; program preparation; handouts and other materials for all participants; drafting of discussion question for participants; preparation and operation of the Youth Town Hall prior to the statewide Town Hall; and community presentations on the results of the Town Hall.

In 2011, The Town Hall received The Outstanding Non-Profit Diversity Award from the Black Board of Directors in recognition of the Town Hall's "outstanding diversity" on its "Board of Directors and in community outreach." The Arizona Capitol Times just announced that the Arizona Town Hall will be awarded its 2012 "Lifetime Achievement Award" in conjunction with its Leaders of the Year in Public Policy event. Earlier this year, Arizona Town Hall was also awarded the Juliana Yoder Friend of the Humanities Award by the Arizona Humanities Council.

The original and actual annual cost of two statewide Town Halls, the related Youth Town Halls and the 20-40 community outreach programs is approximately $622,000.

The "projects" take place annually. The project owners are the Town Hall's Board of Directors. Contact information for the Town Hall's Board of Directors is contained in the Board Book included with this submission.

Key Personnel Resume and Qualifications

The project would be overseen by Tara Jackson, President of the Arizona Town Hall and the same person who oversaw the 2006 Downtown Scottsdale Town Hall, and the Tucson Regional Town Hall. She has also served as President of the Arizona Town Hall, overseeing statewide Town Halls and other consulting arrangements since June of 2006. Her resume is enclosed.

The project would include highly-skilledprofessionals who have previously served as Panel Chairs or Recorders for at least two Arizona Town Halls. Resumes or biographies for personnel who have indicated they would work on this project are enclosed. Actual personnel will vary depending on the schedule set for the public gatherings and the number of participants. However, any Panel Chairs or Recorders for this project would have already successfully served in these capacities for at least two statewide Arizona Town Halls and will have attended extensive training in public participation, consensus-building, group facilitation, public speaking, presentations, and working with a broad cross-section of stakeholders. All of the personnel whose resumes or bios are enclosed have had extensive time serving on the Training Committee for the Arizona Town Hall which trains professionals in the skills of civic participation and consensus building. Several worked on the 2006 Downtown Scottsdale Town Hall.

The organizational chart for the Town Hall Board and Executive Committee is contained as part of the enclosed Board Books.

The home office for the Arizona Town Hall is at the address in Phoenix listed on this letter. Tara Jackson has served as President of the Arizona Town Hall since June of 2006. However, she began her service with the Town Hall much earlier. She first worked with the Town Hall in the spring of 1994 as a volunteer recorder and went on to serve in many other volunteer capacities before taking over as President in 2006.

There are not currently any proposed sub-consultants.

The personnel allocation (other than Tara Jackson and Town Hall clerical and communication staff) is dependent on the actual dates and scope of the project, including the number of preferred participants. Panel Chairs and Recorders for the project will likely include those referenced above whose resumes or bios are enclosed.

Below is a proposed timetable:

1. October 2012
    a. Determine scope of project (number of preferred participants, whether city prefers separate events focused on youth or other groups).
    b. Develop application for participants, as well as method for Scottsdale residents to submit their thoughts or concerns.
    c. Develop outreach efforts (correspondence, press releases, contacts with relevant businesses, residents and organizations) to encourage participation by diverse residents.
    d. Work with the city of Scottsdale's staff to develop background materials to provide to participants, logistics for gatherings and scope of discussion subjects.
2. November and December 2012
    a. Finalize event format and logistics, including meal speakers if desired.
    b. Correspondence with potential participants.
    c. Continued work on background materials and potential areas of discussion.
    d. Finalize staffing for the Town Hall session(s).
3. Mid to Late January 2013: Town Hall Session(s) with Scottsdale residents. Final recommendations report to be completed within one week of final session.

Project Approach

The Arizona Town Hall's approach to this project will be similar to the approach used in 2006 for the Downtown Scottsdale Town Hall and the approach that is used for the statewide Town Halls. Parts of this approach, such as the timing and number of sessions, may be modified as needed or preferred by the city of Scottsdale. Essential components of the project are as follows.

1. All aspects of the approach will incorporate efforts to include a diverse and representative group of participants and ideas. Arizona Town Hall has a long history of working with local organizations and institutions to involve diverse members of the community who may not normally be involved in policymaking.

This project would include these kinds of outreach efforts and, depending on the city'spreferences, may include events that occur at the location where populations gather who are not normally involved. For example, Arizona Town Hall could convene a separate session designed to appeal to youth at Scottsdale Community College or another location.

2. The Town Hall process is one grounded in fact-based civil discourse that results in a consensus recommendations report. This project will be approached in the same way. For example, the Town Hall will work with Scottsdale to create a set of background documents for use by participants to ensure that discussions are fact-based. All aspects of this project, especially the participant events, will be managed in a way that maximizes robust yet respectful conversation and creative solutions built from diverse perspectives.
3. While participants are encouraged to share their opinions and work through the issues together, the facilitators (Panel Chairs and Recorders) are selected and trained to ensure objectivity and impartiality throughout the process.
4. All aspects of the process, including the formatting of the questions and selection of speakers, are designed to maintain the integrity of the Town Hall process which encourages open ended discussion of the issues, a lack of bias in the process, and solution-based recommendations from the participants.
5. A written report of recommendations is created and approved by the participants.
6. A general overview of the Town Hall process is included with this submission.
7. The proposed timeline for significant events is summarized above.
8. The timing of an actual "Town Hall" gathering is dependent on the final logistics. However, the format is highly structured and organized. Examples of the schedule for several recent statewide Town Halls as well as the 2006 Overview of the Downtown Scottsdale Town Hall are included with this submission for reference.
9. City staff assistance for this project is expected to be similar to the 2006 Downtown Scottsdale Town Hall and includes: preparation of background documents; all logistics for the public gatherings; media and press releases relating to participation in the Town Hall; possible assistance with outreach to organizations who serve aspects of the community who are not normally involved in the General Plan; and consultation relating to the scope of public sessions and discussion topics.

Local Knowledge

The Arizona Town Hall works extensively with communities around the state as part of its mission to understand, connect and serve Arizona. The city of Scottsdale is no exception.

In addition to its role in the 2006 Downtown Scottsdale Town Hall, the Arizona Town Hall has been regularly retained to act as a consultant in the Scottsdale area. This includes serving as a consultant using the Town Hall process on several occasions for the Scottsdale Tourism Development Commission and, in January 2011, utilizing the Town Hall process for a gathering of the Scottsdale Healthcare Auxiliary Board of Directors.

The Arizona Town Hall has close working relationships and regular partnerships with Maricopa Community Colleges, including Scottsdale Community College. Scottsdale Community College students are regular participants in statewide Arizona Town Halls.

Business, government and civic representatives from Scottsdale are regularly and deeply involved in the Arizona Town Hall, sharing the perspective and concerns of Scottsdale as part of the Arizona Town Hall's efforts to address statewide issues. See the Arizona Town Hall's enclosed Board Book and Annual Reports for reference. Several of the likely volunteer professional staff who will work on facilitating this project are longtime residents of Scottsdale.

Reference List

In addition to those references listed on the References form (pages 52 and 52A of the RFP), any current or past members of the Arizona Town Hall's Board of Directors can provide a reference relating to the organization and production of the statewide Town Halls. Contact information is contained in the Board Book submitted herewith.

In addition, the following contacts can also provide a reference relating to the statewide Town Halls.

1. Nancy Welch
   Vice President, Arizona Civic Center for Leadership
   Flinn Foundation
   1802 N. Central Avenue
   Phoenix, AZ 85004
   602-744-6833
   nwelch@flinn.org

2. LattieCoor
   Chairman & CEO, Center for the Future of Arizona
   2301 E. Euclid Ave.
   Phoenix, AZ 85040
   602-496-1360
   lattie.coor@asu.edu

3. BrintMilward
   Director, School of Government & Public Policy
   University of Arizona
   315 Social Science Building
   P.O. Box 2100027
   Tucson, AZ 85721-0027
   520-621-7600
   milward@email.arizona.edu

4. Jonathon Koppell
   Dean, College of Public Programs
   Arizona State University
   411 N. Central Ave., Ste. 700
   Phoenix, AZ 85004
   602-496-1432
   koppell@asu.edu

5. Carol Kratz
   Program Director, Virginia G. Piper Charitable Trust
   1202 E. Missouri Ave.
   Phoenix, AZ 85014
   480-948-5853
   ckratz@pipertrust.org

6. John Haeger
   President, Northern Arizona University
   P.O. Box 4092
   Flagstaff, AZ 86011
   john.haeger@nau.edu

7. Rufus Glasper
   Chancellor, Maricopa Community College District
   2411 W. 14th St.
   Tempe, AZ 85281
   chancellor@domail.maricopa.edu

8. Ginger Lamb
   Vice President & Publisher, Arizona Capitol Times
   1835 W. Adams Street
   Phoenix, AZ 85007
   602-889-7129
   ginger.lamb@azcapitoltimes.com

9. Ivan Johnson
   Vice Pres., Cox Communications
   1550 W. Deer Valley Rd., Bldg. C
   MS: DV3-08
   Phoenix, AZ 85027
   623-328-3250
   ivan.johnson@cox.com

Subcontractor List

The Arizona Town Hall does not currently plan on utilizing subcontractors.

Exceptions

The Arizona Town Hall does not anticipate any exceptions.

Sincerely,

Tara Jackson
President

Enclosures

REFERENCES

GENERAL PLAN UPDATE VISIONING

RFP # 13RP005

List minimum of three (3) Arizona customers, excluding the City of Scottsdale, for whom your company has provided service(s) of a similar scope as this Invitation for Bid, during the past three years. Include the length of any contracts listed. Bidders may make multiple copies of this document as needed.

The following questions are asked to enable the evaluation team to assess the qualifications of bidders under consideration for final award. This information may or may not be a determining factor in award of this Solicitation.

Company Name: Town of Marana

Company Address: 11555 W. Civic Center Dr.

City/State/Zip: Marana, AZ 85653

Contact Person: Gilbert Davidson Tel ephone #: 520-382-1999

Email: sandersm001@superiorcourt.maricopa.gov Date of Ser vice: 06/04/12

Type of Service Provided: Conduct Town of Marana's Citizen Forums & supporting activities.

Company Name: Arizona Association of School Business Officials

Company Address: 2100 N. Central Ave., Suite 202

City/State/Zip: Phoenix AZ 85004

Contact Person: David Lewis Tel ephone #: 602-253-5576

Email: dlewis@aasbo.org Date of Ser vice: 06/12/12

Type of Service Provided: Consulting & facilitation of leadership forum Steering Committee meeting

Company Name: Arizona Association of Family & Conciliation Courts

Company Address: 3131 W. Durango St., Ste. 2245

City/State/Zip: Phoenix, AZ 85009-6269

Contact Person: Judge Colleen McNally Tel ephone #: 602-506-5961

Email: sandersm001@superiorcourt.maricopa.gov Date of Ser vice: 01/24/12

Type of Service Provided: Facilitation of Town Hall style discussions at Annual Conference.

YOUR COMPANY NAME: Arizona Town Hall

REFERENCES

GENERAL PLAN UPDATE VISIONING

RFP # 13RP005

List minimum of three (3) Arizona customers, excluding the City of Scottsdale, for whom your company has provided service(s) of a similar scope as this Invitation for Bid, during the past three years. Include the length of any contracts listed. Bidders may make multiple copies of this document as needed.

The following questions are asked to enable the evaluation team to assess the qualifications of bidders under consideration for final award. This information may or may not be a determining factor in award of this Solicitation.

Company Name: Scottsdale Healthcare Medical Center

Company Address: 7351 E. Osborn Rd.

City/State/Zip: Scottsdale, Arizona 85251

Contact Person: Felicia Prostrollo Tel ephone #: 480-323-4560

Email: fprostrollo@shc.org Date of Ser vice: 01/10/11

Type of Service Provided: Facilitation of Town Hall style discussions.

Company Name: _____

Company Address: _____

City/State/Zip: _____

Contact Person: _____ Tel ephone #: _____

Email: _____ Date of Ser vice: _____

Type of Service Provided: _____

Company Name: _____

Company Address: _____

City/State/Zip: _____

Contact Person: _____ Tel ephone #: _____

Email: _____ Date of Ser vice: _____

Type of Service Provided: _____

YOUR COMPANY NAME: Arizona Town Hall

Arizona Town Hall

Annual Report 2010

ARIZONA
TOWN HALL
Creating Solutions

Arizona Town Hall members consider future Town Hall topics at the 2010 Annual Meeting.

Arizona Town Hall's Mission

Arizona Town Hall is an independent nonprofit membership organization that identifies critical issues facing Arizona, creates the forum for education and exploration of the topic, and fosters leadership development.

By drawing upon Arizona's diversity of citizens, the Town Hall process promotes public consideration of these issues, builds consensus, and supports implementation of the resulting recommendations through its members.

Visit www.AZtownhall.org for recommendations, reports, news and events.

2010

Creating Solutions

Dear Arizona Town Hall members, partners, supporters and friends:

2010 was both a challenging and enlightening year. We faced the recession head on with our Town Hall on Jobs, Innovation and Competitiveness; and we took on the growing frustrations with our governmental institutions when we examined Arizona's Government and the changes that might be considered on the brink of our 100th Centennial Celebration. Through it all, the Arizona Town Hall brought together an amazingly diverse cross-section of Arizonans who devote countless hours to civil discourse, finding common ground and creating solutions for our state. We are excited to share just a few of the highlights of the past year as we also rally for our important work in 2011 and beyond.

- Hosted two statewide Town Halls: Building Arizona's Future: Jobs, Innovation and Competitiveness; Arizona's Government: The Next 100 Years. Both groups developed consensus recommendations, many of which have already been implemented, championed by various individuals and groups or are in the process of being implemented.
- Engaged in strategic partnerships with Arizona's universities, community colleges, private foundations, governmental organizations, and businesses to address critical policy issues and needs through the creation of statewide and community-based programs.
- Inspired positive action through Community Outreach Programs held around the state. These programs inspire attendees to connect, grab on to the various recommendations shared and play their own role in possible solutions.
- Provided workshops and professional consultation to individuals, public entities and organizations on the use of the Town Hall process to develop solutions to pressing issues.
- Collaborated with Girl Scouts Arizona Cactus-Pine Council, Arizona Foundation for Women, Center for the Future of Arizona, and the O'Connor House Project in "A Day of Civic Action."

As we move through 2011, we're excited to have Arizona Town Hall focus on arts and culture for the first time as a primary topic. The spring Town Hall in Tucson, entitled "Capitalizing on Arizona's Arts and Culture," will feature nationally-recognized leaders in the arts arena as our keynote speakers. At a time when a great deal of discussion and effort is underway to diversify Arizona's economy, particularly within the renewable sector, the fall Town Hall at the Grand Canyon will address the complex issue of energy.

And in what we believe will make a fabulous 50th Anniversary Year for the Town Hall, the 2012 topics will explore civic engagement and leadership.

On June 3, 2011, Town Hall members will convene at the Annual Meeting to consider topics to be addressed in subsequent Town Halls.

Our Fall Luncheon will be held this year on September 22nd at the Wyndham Downtown Phoenix. This luncheon will be part of "A Day of Civic Action" with the O'Connor House Project, The Flinn Foundation, Center for the Future of Arizona, Girl Scouts of Arizona and Valley Leadership.

Throughout 2011, Arizona Town Hall will travel around the state reporting on the important recommendations that develop from each main Town Hall, gathering additional input from individual communities, and serving as a catalyst for positive change. We invite you to be part of the process and to bring others along for the important conversation. The future of the state is in our hands. Collectively, we can make a difference.

Bruce L. Dusenberry
Chair, Board of Directors

Tara L. Jackson
President

"The state's problems won't be solved without each individual taking responsibility. Arizonans need to educate themselves and others on the issues of the day and participate in forums like Town Hall and vote for candidates who are 'committed to service-based leadership.'"

—Lisa Lovallo, Vice President and System Manager
Cox Communications, Southern Arizona, Tucson

Ron Walker of Kingman, Verlyn Fick of Sierra Vista and Stephen Diamond of Mesa and other participants weigh in on the issues of Jobs, Innovation & Competitiveness.

Building Consensus

Building Arizona's Future: Jobs, Innovation & Competitiveness

In addition to striking a blow to Arizona's economy, the Great Recession exposed the weaknesses in the composition of the state's economic engines. A healthy economic future requires both reversing the deep declines in job opportunities and developing new approaches to building a competitive economy. The 96th Arizona Town Hall addressed how best to create a diversified and sustained economy. The roadmap was filled with key points: improve the education system; generate science and technology industries; support a favorable business climate; and, invest in research and development.

Key Specific Recommendations

Education. Implement recommendations of the Governor's P-20 Council to emulate the best practices of the world's education systems. Improve funding and rigorous statewide standards to meet workforce needs of business and industry. Ensure that students have a place in the state's economy.

Strategic Planning. Create statewide and regional or community-based strategic plans to guide economic development activities in urban, rural and tribal areas under a shared vision. Identify Arizona's core competencies and weaknesses; set a path to a diversified economy with clear implementation goals, actions and accountability. Address infrastructure, workforce and capital development for large and small businesses. Focus on recruiting new businesses and retaining companies and talent already here in the state. Inspire state universities to team with economic development entities to create a comprehensive statewide economic development plan.

Changes in Governmental Structures and Political Ideologies. Take a proactive approach to bringing targeted industries and jobs to the state. Promote a moderate and stable political environment with a more diverse leadership. Clarify role of state's commerce and economic development entities; address urban and rural areas. Ensure legislature commits to supporting an economic development entity, creates and funds a rapid response team to bring opportunities to the state, undertakes a comprehensive evaluation of state laws to identify changes needed to remove impediments to economic development.

Capital Formation. Increase availability of all types of capital to support economic development. Provide public backing to outside capital and promote public/private partnerships to bring capital to the state. Consider changes to the statutes governing the charter of financial institutions to encourage capital infusion. Encourage individuals, foundations and industry to invest in a state "fund of funds" to provide venture capital for early-stage companies.

Reputation Management. Use a PR strategy to control damage to state's reputation and then brand and promote positive image regionally, nationally and internationally.

Infrastructure. Create networked business environment through advanced transportation system and data connectivity. Make essential services such as water and power sufficient for growth in all communities.

Broadening the Tax Base. Implement a broad-based, diversified and stable tax structure. Consider changing constitution to raise state's debt limit. Eliminate bias in tax policy that requires super-majority to raise taxes while lowering them only requires a simple majority.

Preserve Quality of Life. Cultivate arts, sports and other recreational amenities. Preserve natural and cultural resources. Develop strong sense of place in our communities.

Pursue Jobs in the Renewable Energy Industry. Pursue international investment capital to fund development activities. Utility regulators should continue to set renewable energy goals to encourage renewable energy development. Adopt renewable energy stimulus agenda.

Job Training Programs. Fund and promote job training programs and other skill-specific education programs through higher education systems aligned with key industry clusters the state wants to retain and attract.

Other Economic Development Actions and Activities that Influence Economic Development. Fund business incubators and other small business assistance programs. Consider tax abatement program for companies that hire new employees or relocate to the state. Work to ensure siting of F-35 training program to Arizona sites. Improve strategic alliance with Mexico. Lead national effort to establish guest worker program. Pursue comprehensive, multi-modal transportation planning and design programs. Pair college grads with existing business or reimburse student tuition or forgive student loans for grads with "hot skills" who agree to work in Arizona.

* This is a brief summary of the recommendations. To view the full report, visit our website at www.AZtownhall.org

Background report prepared by the University of Arizona.
Special thanks to editors Vera Pavlakovich-Kochi and Jen McCormack.

"You get together with a whole bunch of other people throughout the state that have a great diversity of backgrounds and ideas, and you get the opportunity to really hash it out and have some great discussions."

— Scott Stewart, Town Council Member, Wickenberg

Madan Singh of Phoenix and Scott Stewart of Wickenberg participate in panel discussions on Arizona's government systems.

Developing Leaders

Arizona's Government: The Next 100 Years

As Arizona approaches its statehood's Centennial, the 97th Arizona Town Hall turned its focus on the way its government has functioned in the past and what modifications could be made to ensure a viable future. From examining the Arizona Constitution to the various branches of government, including tribal nations, political systems and elections, our state's governance was put under the microscope to produce a collective view of what changes can be made to move the state forward. The various themes that emerged included the role of the government as serving the public good, the importance of proactive and long-term planning, economic development as an imperative and education as an investment in the future.

Key Specific Recommendations

Elect the best people. Abolish term limits. Create competitive districts. Reform or repeal Clean Elections. Increase legislative salaries.

Empower government to solve financial problems. Reexamine Arizona's tax structure. Eliminate the supermajority requirement to raise revenue. Raise or eliminate the debt limit. End unfunded mandates and legislative sweeps.

Reform and reorganize the executive branch. Appoint (subject to senate confirmation) positions of mine inspector, superintendent of education and state treasurer. Create a lieutenant governor position. Have the executive branch assume greater responsibility for long-term and strategic planning.

Support Arizona's judicial branch. Expand merit selection. Establish a stable funding source. Abolish the mandatory retirement age of 70. Increase education and training for justices of the peace. Develop methods to better inform the public on how the court system works.

Reform the constitutional amendment processes. Implement measures to assure constitutional amendments receive due consideration.

Develop long-term and strategic planning processes. Key issues should include economic development, education, tax policy, energy, water and technology. Establish a strategic planning commission that includes members of all branches and levels of government.

Refocus government priorities. Highest priorities should be education and economic development.

Increase transparency in decision-making. Use latest technologies to connect all people to their government. Revise Open Meeting Law to include legislative process. Provide 72-hour notice period between proposed final budget and final adoption by the legislature.

Improve coordination among governments. While understanding these complex relationships, support efforts of governments making it a priority to work together to achieve the common good for all.

Promote civic involvement. Support government taking an active role in promoting an effective, informed citizenry, enhancing civic engagement and the use of civil discourse as a priority across Arizona.

* This is a brief summary of the recommendations. To view the full report, visit our website at www.AZtownhall.org

Background report coordinated by the University of Arizona
College of Social and Behavioral Sciences and Outreach College.
Special thanks to project coordinator H. Brinton Milward.

"The ultimate consensus that we reach, the research that we completed and the recommendations we make will be communicated to the general public and changes will be made to our government that will make life better in Arizona."

– Paul Julien, Judicial Education Officer
Arizona Supreme Court, Phoenix

Attendees at an outreach program in Surprise prepare to discuss the recommendations derived at the "Jobs" Town Hall.

Engaging Citizens

Reaching out to Arizona communities to promote public consideration and implementation of Town Hall recommendations.

By design, Arizona Town Halls include: well-researched objective facts; varied political and professional perspectives; input from Arizona's diverse populations; and, a report of consensus-based recommendations that blends all these factors.

The facts presented and recommendations developed at Town Halls represent a unique source for policymakers, leaders and students seeking answers to Arizona's most pressing issues. This valuable information is carried from the Town Halls to the rest of Arizona through various community outreach efforts.

In 2010, the Arizona Town Hall directly engaged thousands of community leaders and interested citizens with action-focused Community Outreach Programs. These programs informed audiences of the key facts and recommendations developed at the Town Halls and engaged them in Town Hall- style discussions to set their priorities and drive action.

Community Outreach Programs are sponsored by universities, community colleges, civic groups, elected leaders, professional organizations and businesses. In 2010, more than 30 programs were held in communities throughout the state, including:

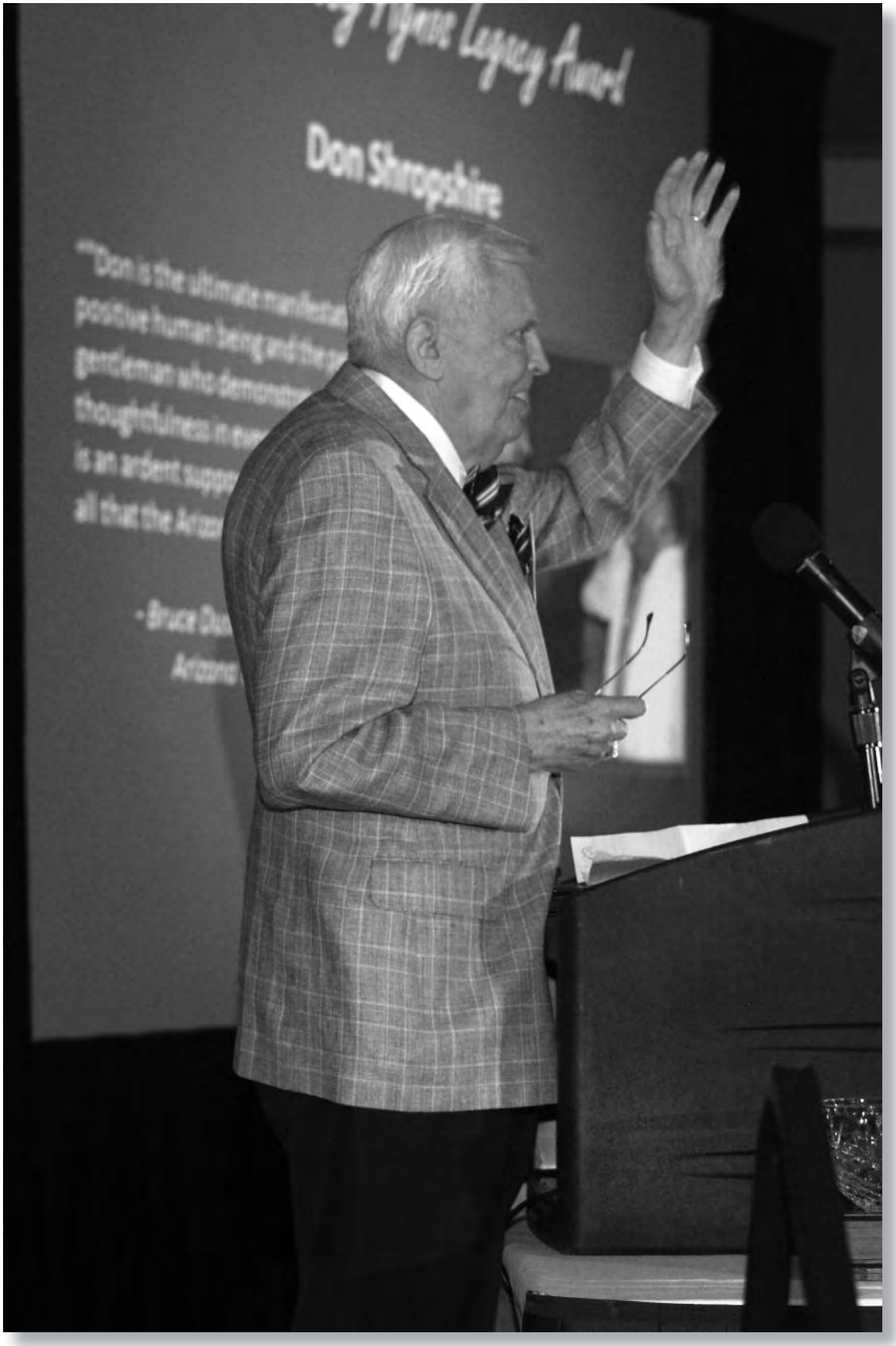
- Douglas
- El Mirage
- Flagstaff
- Glendale
- Kingman
- Mesa
- Parker
- Phoenix
- Scottsdale
- Sedona/Verde Valley
- Show Low
- Sierra Vista
- Tucson
- Yuma

Many more Arizonans learned about Town Hall recommendations through coverage in local and statewide newspapers, and stories aired through various radio and TV outlets.

Collaboration and strategic partnerships allow Arizona Town Hall to magnify the impact of its gatherings and to support the efforts of other organizations seeking to improve the lives of all Arizonans.

In 2010, the Arizona Town Hall:

- Partnered with other organizations to bring in nationally-recognized experts for presentations at Town Hall gatherings.
- Helped publicize and support efforts by groups involved with actions promoting Town Hall recommendations on land use, education, transportation, housing and economic development.
- Promoted the use of different tools for civic engagement with the 21 partner organizations involved with Project Civil Discourse.
- Provided consulting services to communities and organizations interested in using Arizona Town Hall's unique consensus-building process.



2010 Shirley Agnos Legacy Award recipient, Don Shropshire, is celebrated at the Annual Luncheon featuring special guests such as former Supreme Court Justice Sandra Day O'Connor.

Identifying Critical Issues Facing Arizona

2010 Annual Meeting and Selection of Town Hall Topics

On June 18, 2010, approximately 100 members gathered from around the state to reconnect and consider topics for upcoming Town Hall discussions. Highlights from the Annual Meeting included:

- Presentations by:
  - **Lattie Coor,** Chairman & CEO, Center for the Future of Arizona; President Emeritus & Professor, School of Public Affairs, Arizona State University
  - **Jack Jewett,** President & CEO, The Flinn Foundation
  - **Steven Wheeler,** Executive Vice President of Customer Services and Regulation, Arizona Public Service Company (now retired)
- Election of new Board Members and Officers
- Consideration of the following topics for future Town Halls:
  - Civic Engagement
  - Leadership
  - Energy

With input from the membership, the Executive Committee selected Energy as the topic of the Fall 2011 Town Hall and Civic Engagement and Leadership for the 2012 Town Halls, which will mark the 50th Anniversary of the Arizona Town Hall.

Supporting Implementation of Results

2010 Fall Luncheon: *A Day of Civic Action*

The 2010 Fall Luncheon was held as part of a first-time collaborative with four other leading nonprofit organizations joining forces to talk about civic engagement at a time when the state was facing devisive rhetoric and heightened passions on a variety of issues. Highlights from the event held on September 23, 2010, included:

- Collaboration with four other premier service organizations for "A Day of Civic Action" which included workshops, presentations and opportunities for civic engagement;
- Presentation of highlights of recent actions to implement Town Hall recommendations;
- Keynote address by Frances Hesselbein, Chairman of the Board of Governors, Leader to Leader Institute, Founder of the Peter F. Drucker Foundation;
- Presentation of the Shirley Agnos Legacy Award to Don Shropshire, President Emeritus, Tucson Medical Center; former Chair, Arizona Town Hall, Tucson;
- A successful online and silent auction made up of donated services and activities; and
- Approximately $40,000 raised for Arizona Town Hall.

"I would recommend the Town Hall to anyone who is interested in some lively discussions and being a participant in maybe changing the direction of what happens in the State of Arizona."

— Bob Burns, Fmr. Arizona State Senate (Dist. 9);
President, BGM Investments, Inc., Peoria

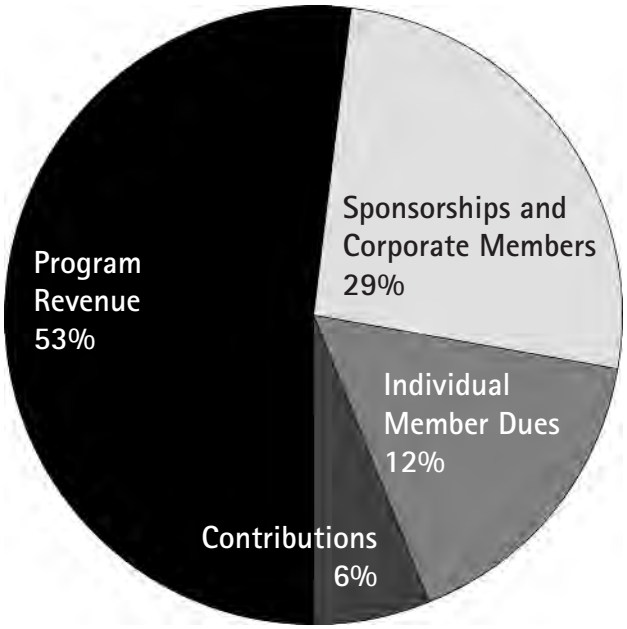
Long-time member and Town Hall champion Marty Shultz checks in at the 2010 Annual Meeting with Town Hall volunteer, Madeline Loughlin.

Creating Solutions

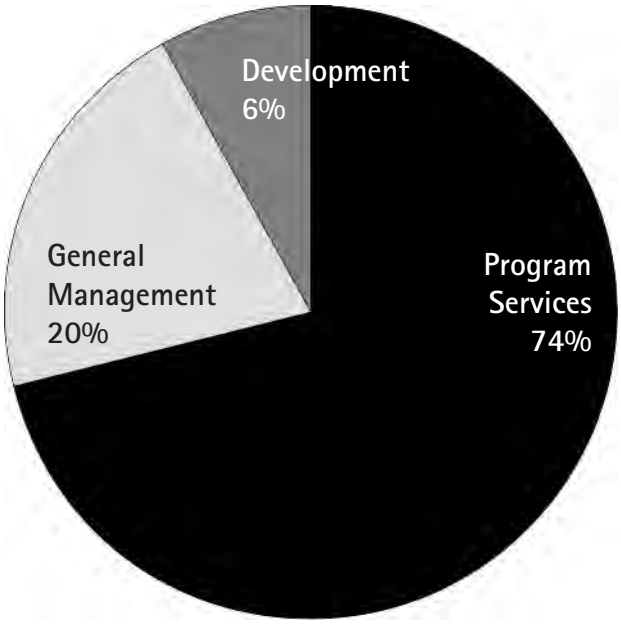
With Operating Efficiency and Diverse Funding Sources

The economy hit Arizona hard in 2010 and perhaps no group felt it more that the state's nonprofits and the people they serve. While the Arizona Town Hall felt the impact of the economy in the form of reduced sponsorships, donations and memberships, the organization was able to maintain all programs through a combined approach of targeting new revenue sources, reducing staff hours, soliciting in-kind services, increasing the use of electronic forms of communication, and partnering with like-minded organizations to reduce overhead expenses. Thank you to all Town Hall supporters and members who made this possible.

2010 Operating Income Sources



2010 Operating Expense Sources



Arizona Town Hall Staff

From left to right: Debbie Stanhope, Website & Publications and Roy Stanhope, Accounting; Tara Jackson, President and Kathy Haake, Volunteer; Lexy Bahn, ASU Student Intern and Luz Madrid, Executive Asst. - Office Operations

Creating Solutions

Through the Generosity of our Contributors

Contributions listed below include the value of in-kind contributions.

Corporate and Professional Members and Sponsors

► Presenting Sponsor ($25,000 – $49,000)

THE VIRGINIA G. PIPER CHARITABLE TRUST

► Contributing Sponsor ($15,000–$24,999)

ARIZONA PUBLIC SERVICE

► Collaborating Sponsor ($10,000 – $14,999)

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Mike Widener, Nat White and Debbie McCune Davis participate in discussions on the topic of government at the fall 2010 Town Hall.

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BALENTINE, VICKI
Superintendent, Amphitheater Unified School District, Tucson
BARAJAS, MAGDALENA
Program Liaison, City of Tucson
BARTLETT, DAVID C.
Retired Attorney, Former Majority Whip, Arizona State Senate, Tucson
BAURLEY, ANDELA
Managing Partner and Founder, Affinity Financial Group; Board President, Habitat for Humanity, Tucson
BOGUTZ, ALLAN
Attorney, Bogutz & Gordon, Tucson
BOICE, FRED T.
Principal, Boice Financial Company; President, Arizona Board of Regents, Tucson
BOLDING, BETSY
Director, Consumer Affairs, Tucson Electric Power Co., Tucson
BOREK, THEODORE
Judge, Pima County Superior Court (Div. 24), Tucson
BOWLEG, VICTOR
Mediator, Family Center of the Conciliation Court, Pima County Superior Court; Adjunct Faculty, Pima Community College, Tucson
BREAULT, ROBERT P.
Chairman, Breault Research Organization Inc., Tucson
BRONSON, SHARON
Member, Pima County Board of Supervisors (Dist. 3), Tucson

Cathy Weiss at the 2010 Fall Luncheon.

BROWN, SCOTT
Managing Partner, Western Housing Solutions, Tucson
BRUMM, BRAD
Dentist, Tucson
BRUNDAGE, JANICE
Psychologist; Owner, Madera Counseling Center, Tucson
BYRNE, KATHY
CEO, El Rio Community Health Center, Tucson
CALHOUN, JEAN
Director, Land and Water Conservation, The Nature Conservancy, Tucson
CAMPER, JOHN C. (JACK)
President, Tucson Metropolitan Chamber of Commerce, Tucson
CANDEUR, EMILIE
Student, Pima Community College, Tucson
CANTON, CANDACE THORNE
Director of Administration, Mesch, Clark & Rothschild, P.C., Tucson
CAPIN, ESTHER N.
Civic Leader; Ret. Mental Health Counselor, Nogales/Tucson
CARRELL, MELINDA
Ret. Field Director, Congressman Jim Kolbe, Tucson
CARRELL, WILLIAM D., JR.
Ret. Physician (Internist), Tucson
CASSIDY, FRANK
Town Attorney, Town of Marana
CERVELLI, JANICE
Dean, University of Arizona College of Architecture & Landscape, Tucson
CHAFFEE, FRED J.
President & CEO, Arizona's Children Association, Tucson
CHOSHI, KHUTSO
Student, Pima Community College, Tucson
CIASCA, CRIS
Chief Financial Officer & Human Resources Director, YMCA of Metropolitan Tucson
CLANAGAN, RUSSELL
Council Member, Town of Marana
CLARK, W. MARK
President & CEO, CODAC Behavioral Health Services of Pima County, Inc., Tucson
CLARKE, RAYMOND
Regional Vice President, Amity Foundation;
Fmr. President & CEO, Tucson Urban League, Tucson
COLLAZO, TOM
Associate State Director, The Nature Conservancy, Tucson
COLTON, ARLAN
Planning Director, Pima County Development Services, Tucson
COYNE-JOHNSON, PATRICIA
College of Architecture and Landscape Architecture, University of Arizona, Tucson
COZINE, BILL
Senior Loan Officer, Fairway Independent Mortgage Corp., Tucson
CUNNINGHAM, GEORGE R., JR.
Former Deputy Chief of Staff, Arizona Governor's Office; Owner, Cunningham Properties; Former Arizona State Senator, Tucson
DALE, DEBORAH
Executive Director, Arizona List, Tucson
DALE, RICHARD
Physician (General & Vascular Surgery), San Rafael Medical Center, Tucson
DAVIDSON, GILBERT
Town Manager, Marana
DAVIS, NATALIE
Community Volunteer/Homemaker, Tucson
DEGROOD, JAMES
Transportation Services Director, Pima Association of Governments, Tucson
DELIC, ELMA
Student, University of Arizona;
Chair, Arizona Students' Association, Tucson
DIAMOND, DONALD R.
Chairman, Diamond Ventures, Inc., Tucson
DIAMOND, STEPHEN
Flight Instructor, Mesa Air Group, Tucson
DIXON, GERALD
Chairman, The Gadsden Company, LLC, Tucson
DOBRAS, DARRYL B.
President, DBD Investments, Inc., Tucson
DOBRAS, MARY ANN
Community Volunteer; Ret. Psychiatric Nurse, Tucson
DUCOTE, RICHARD
Community Affairs Manager, Southern Arizona, Freeport-McMoRan Copper & Gold, Green Valley
DUNCAN, H. DANIELS
Senior Vice President, External Relations, United Way of Tucson & Southern Arizona, Tucson
DUNFORD, DAVID
Adjunct Professor, University of Arizona and Thunderbird–The Garvin School of International Management;
Ret. U.S. Ambassador, Tucson
DUSENBERRY, BRUCE E.
Owner & CEO, Horizon Moving Systems, Tucson
DUSENBERRY, BRUCE L.
President, Horizon Moving Systems; Attorney;
Arizona Town Hall Board Chair, Tucson
DUSENBERRY, KATIE
Exec. Vice President & Treasurer, Horizon Moving Systems, Tucson
ELIAS, ALBERT
Director, Urban Planning and Design, City of Tucson
EMERSON, KIRK
School of Public Administration and Policy, University of Arizona, Tucson
ENGEL, KIRSTEN H.
Professor, University of Arizona College of Law, Tucson
ESCHER, JOHN, III
Shareholder, Waterfall, Economidis, Caldwell, Hanshaw & Villamana, P.C., Tucson
ESCHER, PATRICIA G.
Retired Judge, Pima County Superior Court, Tucson
ESPOSITO, DAVID M.
Management Consultant, Empowering Leaders LLC, Tucson
EVEN, BRENDA B.
President, Downing Lane Enterprises, Inc., Tucson
FEENEY, PATRICIA
Tucson Market President, JPMorgan Chase Co., Tucson
FELL, STEVE
Former Tucson Market President, JPMorgan Chase Co., Tucson
FINLEY, TONY
Chief Financial Officer, Long Companies, Tucson
FLORES, ROY
Chancellor, Pima Community College, Tucson
FRITZE, EMILY
Student, University of Arizona, Tucson
GEORGE, HARRY
Managing General Partner, Solstice Capital, Tucson
GIBSON, JOHN (JACK)
Director and General Manager, Arizona Public Media, University of Arizona, Tucson
GIFFORDS, GABRIELLE
U.S. House of Representatives, Tucson
GILLASPIE, BARRY
Oro Valley Town Council Member, Oro Valley
GILMAN, RICHARD
Organizer, Thinking Arizona, Tucson
GLASSMAN, RODNEY
City Council Member, Ward 2, Founder & President, Glassman Foundation, Tucson
GOMEZ, NICOLETTE
Student, Pima Community College, Tucson
GRASSINGER, MICHAEL
Principal & Chief Executive Officer, The Planning Center, Tucson
GREENHILL, ANDREW
Chief of Staff, Office of Mayor Bob Walkup, Tucson
GRIFFITH, ESTELLE SPAID (BEE)
Retired, Tucson
GROSSETTA, GAIL PRICE
Ret. President, Grossetta International, L.L.C., Tucson
GUTIERREZ, JAIME
University of Arizona, Tucson
HALPENNY, PHILIP
President, Water Development Corp., Tucson
HAMMOND, MICHAEL S.
President, PICOR Commercial Real Estate Services, Tucson
HARBOUR, BOB
CPA, Beach Fleischman, Tucson
HARRIS, CHARLOTTE
Ret. Director of Development, Salpointe Catholic High School, Tucson
HARRIS, MICHAEL J. (deceased)
Vice President, Long Realty Co., Tucson
HEALY, STEPHANIE
President, Hospital Council of Southern Arizona, Tucson
HECHLER, PAULINE URBANO
Vice President of Development, Community Food Bank, Tucson
HELLON, MIKE T.
President, Hellon & Associates, Inc.;
Arizona Member, Republican National Comm., Tucson
HILLER, ROBIN L.
Executive Director, Voices For Education, Tucson
HINDERAKER, TED
Attorney, Hinderaker & Rauh, Tucson
HIREMATH, SATISH
Mayor, Town of Oro Valley
HONEA, EDDIE
Mayor, Town of Marana
HOPPER, LISA
Executive Director, World Care, Tucson
HOWARD, JAMES M.
Ret. Attorney, Tucson
HUFFMAN, STEVE
Ex Officio Commissioner, Intergovernmental Affairs Administrator, Marana
HURSH, JEFFREY
Attorney, Snell & Wilmer, Tucson
JACOBS, KATHARINE
Director, Arizona Water Institute; Professor, Soils, Water & Environmental Science, University of Arizona, Tucson
IANNARINO, ROBERT
Vice President of Infrastructure Development, Diamond Ventures, Inc., Tucson
JACOME, FELIPE CARLOS
Former Southern Arizona Regional Director, Alzheimer's Association, Tucson
JENKINS, DAISY
Senior Vice President of Human Resources, Carondelet Health Network, Tucson
JOHNSON, ANDREW
Student, Pima Community College, Tucson
JOHNSON, PETER
Former Senior Vice President & General Counsel, The Sundt Companies, Inc., Tucson
JOHNSTON, ROBERT B.
U.S. Marine Corps (Ret.), Tucson
JOLIVET, ANNA
Ret. Assistant Superintendent, Tucson Unified School Dist., Tucson
JONES, PAT
Director, Office of Technology, University of Arizona, Tucson
KISER, JAMES
Editorial Page Columnist, The Arizona Daily Star, Tucson
KISER, SHIRLEY
Former Executive Director, Tucson Education Association, Tucson
KITAGAWA, JOHN
Rector, St. Phillip's in the Hills Episcopal Church, Tucson
KITAGAWA, KATHLEEN
Owner-Consultant, KAK Compensation Services, LLC, Tucson
KITTLE, JAY S.
President, Palo Seco Corporation; Attorney, Tucson
KLEMMEDSON, ADALINE
Vice President, Administrative & Corporate Relations, University Medical Center, Tucson
KOFFLER, HENRY
President Emeritus, University of Arizona;
President, Arizona Senior Academy, Tucson
KOZOLCHYK, BILLIE
Community Volunteer; Homemaker, Tucson
KRAUJA, GEORGE O.
Attorney, Fennemore Craig, P.C., Tucson
LATANE, JANE A.
Interim President, Tohono O'odham Community College, Sells
LAWDER, SUZANNE
CEO, Goodwill Industries, Tucson
LEE, SYLVIA
President, Pima College Northwest Campus, Tucson
LEWTON, QUENTIN
Former truck driver, Sonoita
LIKINS, PETER
President Emeritus, University of Arizona, Tucson
LIM, PHYLLIS
Field Office Director, Tucson HUD Field Office, Tucson
LOOMIS, PAUL
Mayor, Town of Oro Valley
LOVALLO, LISA
Vice President & System Manager for Southern Arizona, Cox Communications, Tucson
MAGNUSON, CHERYL A.
Member, Continental Elementary School District Governing Board, Green Valley
MARCOTTE, JANET
Executive Director, YWCA of Tucson
MARKS, SELMA PAUL
Community Volunteer; Ret. Deputy Pima County Attorney, Tucson
MARRS, JOAN
Executive Director, Catalina Foothills Community School District, Tucson
MARTIN, DAN
Financial Advisor, Greenberg Financial Group, Tucson
MARX, RONALD W.
Dean; Professor, College of Education, University of Arizona, Tucson
MCGRATH, MICHAEL
Attorney; Ptr., Mesch, Clark & Rothschild, P.C., Tucson
MEDLER, ROBERT
Manager of Government Affairs, Tucson Metropolitan Chamber of Commerce, Tucson
MEGDAL, SHARON B.
Director, Water Resources Research Center;
Professor, Agricultural & Resource Economics, University of Arizona, Tucson

University of Arizona students Elma Delic and Emily Fritze provide the student perspective at the Town Hall on government systems.

MERRYMAN, FRANCES
Vice President and Senior Wealth Strategist, Tucson Catalina Foothills Office, Northern Trust Bank, Tucson
MILCZAREK-DESAI, GAVIN
Attorney, Partner, Quarles & Brady, LLP, Tucson
MILES, SUZANNE
Campus President, Pima Community College, Downtown Campus, Tucson
MILWARD, H. BRINTON
Director, School of Government and Public Policy, Providence Service Corporation Chair in Public Management, University of Arizona, Tucson
MINANO, DENNIS R.
Advisor, Public Policy Issues; Ret. Vice President, Environmental & Energy, General Motors, Tucson
MIRABEN, GEORGE W.
Consultant; Fmr. Executive Vice President and COO, Tucson Electric Power Company; Former Chair, Arizona Town Hall, Tucson
MONTAGUE, ERIK
Finance Director, Town of Marana
MOORE, JAMES
President & Chief Executive Officer, University of Arizona Foundation, Tucson
MORE, SARAH
Planning & Building Director, Town of Sahuarita
MORRISON, EMILY KITTLE
Former Deputy Director for Education, The Arizona Aerospace Foundation, Tucson
MORROW, JAMES
Partner, Quarles & Brady, LLP, Tucson
MURPHY, THOMAS
Attorney, Gust Rosenfeld, PLC, Tucson
NACCARATI, DAVID
Former President, Freeport McMoRan Mining Co., Phoenix
NATHANSON, ELAINE
Public Relations Director, BochalkFReY, Tucson
NAUGLE, DAVID
Ret. Administration & Corporate Public Affairs, Southwest Gas Corp., Tucson
NELSON, ANNE E.
Senior Vice President, Investments, Smith Barney, Tucson
NICCUM, COLLEEN
Vice President of Communications, Raytheon Missile Systems, Tucson
NILES, CLAYTON
President, Niles Investment Corp.; Owner & Designated Broker, CNN Realty Services, LLC, Tucson
NORVILLE, ALLAN
President, Financial Associates, Inc., Tucson
NYSTROM, SUZANNE
Ret. Regional Executive Officer, American Red Cross Pacific Region, Tucson
ORR, ETHAN
Executive Director, Linkages, Tucson
PARKER, EDMUND B.
Former President, United Way of Tucson & Southern Arizona, Tucson
PARSONS, JAMES L.
Ret. Physician, Desert Medical Group, Ltd.; Past Pres., Pima Co. Medical Soc., Tucson
PECK, BARBARA
Principal, LP&G Marketing, Advertising, Public Relations, Tucson
PECK, HANK
Certified Financial Planner, TCI Wealth Advisors, Inc., Tucson
PECK, SHELBY
Teacher, Montessori School, Tucson
PETERSON, LEA
President /CEO, Tucson Hispanic Chamber of Commerce, Tucson
PICKENS, MARION LEE
Ret. Teacher; Former Asst. Minority Leader, Az. House of Representatives, Tucson
PIERSON, J. NICHOLAS
CLU, Northwestern Mutual Retirement Planning Specialist, Tucson
PITT, DONALD
President, Cornerstone Capital Management Ltd., Tucson
PLACE, AMANDA
Development Consultant, Pima Library Foundation, Tucson
PROCTOR, MICHAEL
Dean, Outreach College, University of Arizona, Tucson
PROUTY, TIM
President, CB Richard Ellis Tucson, L.L.C., Tucson
RAMEY, APRIL MAY
Student, Pima Community College, Tucson
RAMIREZ, LETTY
Vice President, Advocacy, Government and Community Relations, Carondelet Health Network, Tucson
REUTER, BARBARA SORIANO
Principal, Property Management Division, PICOR Commercial Real Estate Services, Tucson
RICHARDSON, JOAN
Retired, Tucson
ROBINSON, PRISCILLA
Ret. Consultant; Former Exec. Dir., Southwest Environmental Service, Tucson
RODRIGUES, REBECCA RICHELLE HOWARD
Student, Pima Community College, Tucson
ROE, WILLIAM
Retired, Tucson
ROLLINS, KENT
President, University of Arizona Healthcare Foundation, Tucson
RONSTADT, KARL G.
President, Baboquivari Cattle Company, Tucson
ROTHSCHILD, JONATHAN
Attorney, Mesch, Clark & Rothschild, P.C., Tucson
ROWLEY, MARY
President, Strongpoint PR, Tucson
RUBIN, MARK
Attorney, Mesch, Clark & Rothschild, Tucson
SABLE, RON
President, Concord Solutions Ltd., Tucson
SANDER, EUGENE G.
Vice Provost & Dean, College of Agriculture & Life Sciences, University of Arizona, Tucson
SANDERS, KERI
Marketing Manager, CARF International, Tucson
SCHAEFER, HELEN S.
Community Volunteer; Ret. Educator, Tucson
SCHAEFER, JOHN P.
Chairman, LSST Corp., Tucson
SCHORR, S.L. (SI)
Attorney; Partner, Lewis & Roca, Tucson
SHATTUCK, WANDA
Community Volunteer, Tucson
SHAW, LAURA
Senior Vice President, TREO, Tucson
SHELTON, ROBERT
President, University of Arizona, Tucson
SHIM, SOYEON
Director, John and Doris Norton School of Family and Consumer Sciences, University of Arizona, Tucson
SHOOPMAN, RON
President, Southern Arizona Leadership Council, Tucson
SHROPSHIRE, DONALD G.
President Emeritus, Tucson Medical Center; Former Chair, Arizona Town Hall, Tucson
SHROPSHIRE, MARY RUTH
Community Volunteer; Professional Storyteller, Tucson
SILVYN, KERI
Partner, Lewis & Roca LLP, Tucson
SIMMONS, SARAH R. (SALLY)
Judge, Pima County Superior Court, Tucson
SLANIA, MICHAEL A.
Attorney, Russo, Russo & Slania, P.C., Tucson
SMALLHOUSE, DAVID
Managing Director, Miramar Ventures, LLC, Tucson
SMALLHOUSE, SARAH BROWN
President, Thomas R. Brown Family Foundation, Tucson
SNELL, JOE
Executive Director, Tucson Regional Economic Opportunities (TREO), Tucson
SPARK, RONALD P.
Physician (Pathologist); Associate Clinical Professor, College of Medicine, University of Arizona, Tucson
STEGEMAN, MARK
Professor, University of Arizona, Tucson
STORM, PRISCILLA
Vice President, Public Policy & Community Planning, Diamond Ventures, Inc., Tucson
SUNDT, JOHN H.
Principal, 1st Deed Funding, L.L.C., Tucson
TANSIK, LINDA STILES
C.P.A., Tucson
THALASITIS, DEBORAH
Assistant Town Manager, Town of Marana
TOLBERT, LESLIE P.
Vice President, Research, University of Arizona, Tucson
TURNER, ELIZABETH
Student, Pima Community College, Tucson
UNDERWOOD, RICHARD
Vice President, Underwood Bros., Inc. d.b.a. AAA Landscape & Arid Solutions, Tucson
VALLEJO, AURORA
Student, Pima Community College, Tucson
VANEGAS-FUNCHEON, OLIVIA
President, Tohono O'odham Community College, Sells
VATNE, CLARENCE
CEO, Marana Health Center, Marana
VIA, ANNE G.
Community Volunteer, Tucson
VILLICANA, TAUNYA
Co-Founder & Managing Partner, Affinity Financial Group, L.L.C., Tucson
VOEVODSKY, REYN
Community Volunteer, Tucson
WALDEN, RICHARD S.
President, Farmers Investment Co., Sahuarita
WARD, KATHY
Manager, Economic Development & Communications, Town of Sahuarita
WARNER, ANNE C.
Principal, ACW & Associates, Tucson
WATSON, G. JERENE
Interim Town Manager, Oro Valley
WAYNE, BARBARA J.
Ret. Principal, Palo Verde High Magnet School, Tucson Unified School Dist.; Education/Prevention/Community Development Consultant, Tucson
WELSH, DAVID
Senior Vice President, TREO, Tucson
WERNER, FRANCES W.
Community Volunteer; Former Professor, University of Vermont, Tucson
WEST, CAROL W.
Community Volunteer, Former City Council Member (Ward II), Tucson
WEST, NEIL R.
Consultant; Ret. Physician; Former Medical Director, Schaller Anderson, Inc., Tucson
WHEELER, ELLEN K.
Executive Director, Morris K. Udall Foundation, Tucson
WHITEHILL, JAMES A.
Attorney; Quigley & Whitehill, P.L.C., Tucson
WILLIAMS, FRANK R.
Director of Social Services, Casa de la Luz Hospice, Tucson
WOLL, DANE
President and CEO, YMCA of Southern Arizona, Tucson
WOODARD, DUDLEY (DOUG)
Professor Emeritus, University of Arizona, Tucson
WORDEN, MARSHALL A.
Ret. Senior Officer, Policy & Strategic Initiatives, Office of the Associate Vice President for Economic Development, University of Arizona, Tucson
WRIGHT, BRUCE
Associate Vice President, Economic Development, University of Arizona, Tucson
WRIGHT, JOSH
Assistant to the Town Manager, Town of Marana
YOUNG, ANTHONY L.
Executive Director of Southern Arizona Legal Aid, Tucson
YOUNG, BENNY J.
Director, Highway and Floodplain Department, Cochise County, Tucson
ZLAKET, THOMAS A.
Attorney, Law Offices of Thomas A. Zlaket, P.L.L.C.; Ret. Chief Justice, Arizona Supreme Court, Tucson

► PINAL COUNTY

BARBER, SCOTT J.
Administrative Services Director, City of Casa Grande
BENEDICT, BRETT
Director of Financial Services, Electrical District 3, Casa Grande
BEVERIDGE, JACK
President & CEO, Empowerment System, Inc., Apache Junction
CASUGA, EVELYN
General Manager, Community Development and Customer Offices, Arizona Public Service Co., Casa Grande
DOOLITTLE, TERRY
Pinal County Manager, Gold Canyon
EIDE, GARY
Town Manager, Kearny
EVANS, KEVIN
City Manager, City of Maricopa, Maricopa
GRIFFIN, MARQUISHA
Council Member, City of Maricopa
HARTDEGEN, JIM
Director of Land Management & Public Relations, Electrical District No. 3; Founder, Hartdegen Group, Casa Grande
JACKSON, JUDEE
Manager, Community Relations, Pinnacle West Capital Corp./Arizona Public Service Co., Casa Grande
MONTOYA, KARL
Mayor Pro Tempore, City of Casa Grande, Casa Grande
POWELL, DICK
Owner, Powell Feed & Supply; City Councilmember, Casa Grande

Arizona Town Hall Board members Evelyn Casuga and Gilbert Davidson listen to the discussion at the 2010 Annual Meeting.

RHODES, EVERETT
Director, Project CENTRL, University of Arizona, Casa Grande
RIVES, JIM
President & CEO, Maricopa Economic Development Alliance, Maricopa
SIEGWARTH, MARK
Exec. Director, Boyce Thompson Arboretum, Superior
SMITH, SANDRA L.
President and CEO, Pinal Partnership; Fmr. Member, Pinal County Board of Supervisors, Apache Junction
SNIDER, DAVID
Member, Pinal County Board of Supervisors; Ret. City Library Director, Casa Grande
WHITE, GEORGIA
Vice President, Central Arizona College, Casa Grande
YOST, TOM
Area Energy Delivery Manager, Arizona Public Service, Casa Grande

► SANTA CRUZ COUNTY

GRAY, BARBARA
Community activist, Spiritual director, Tubac
HEISS, RANDY
Town Clerk, Patagonia
MAYNARD, JOHN C.
Member, Santa Cruz County Board of Supervisors, Nogales
POLHEBER, RICHARD
CEO, Carondelet Holy Cross Hospital; Chief Strategic Officer, Carondelet Health Network, Nogales/Tucson

► YAVAPAI COUNTY

BARNETT, TIMOTHY J.
Chief Executive Officer, Yavapai Regional Medical Center, Prescott
BAUER, ELLIE F.
Artist; Business Partner, Alcora Marble; Clarkdale
BEACH, MARGIE
Communications Director, Salt River Materials Group, Clarkdale
BLUFF, MICHAEL R.
Attorney, Law Office of Michael R. Bluff; Vice Pres., Mingus Constructors, Inc., Clarkdale
BROWNRIDGE, ALYCE
Head of the Orme School of Arizona, Mayer
BULLERI, DINO R.
Real Estate Broker & Investments, Dino R. Bulleri & Associates, Inc.; Owner, Bulleri Professional Building & Bulleri Networks, Prescott
BUNKER, JIM
Mayor, Chino Valley
EDGMON, ROD
Education Director, Yavapai Prescott Indian Tribe, Prescott
ELLEGOOD, MIKE
Director Emeritus, Maricopa County Transportation, Prescott
FAIN, BILL
President: Fain Land & Cattle Co. and Shamrock Water Co.; Owner & Member, Fain Signature Group, Prescott Valley
GOSWAMI, UTPAL
Vice President and Provost, Yavapai College, Prescott
GRADY, HARVEY
President & CEO, Cornucopia Community Advocates, Sedona
GROSETA, ANDY
Rancher/Agribusiness Owner, Cottonwood
HOFFMAN, DAVA
Rural & Urban Planner, Dava & Associates, Inc., Prescott
JOENS, DIANE
Mayor, Cottonwood
JOHNSEN, MICHAEL
Community Relations Manager, N.W. Div., Arizona Public Service Co., Prescott
KUEHL, MARTINA
Consultant, Kuehl Enterprises, LLC, Humboldt
LINN, TAMMY A.
Councilperson, City of Prescott; Executive Director, United Way of Yavapai County, Prescott
MABERY, GAYLE
Town Manager, Clarkdale
MEDOW, PAULA
Realtor, Russ Lyon Realty, Sedona
MILLER, BENJAMIN H.
Manager, Real Estate & Investments, Miller Bros., L.L.C., Sedona
MOSLEY, CHARLES
Director of Public Works; City Engineer, City of Sedona
NEWTON, RAY
Professor/ Administrator Emeritus, Northern Arizona University, Prescott
ORME, PAUL R.
Attorney, Paul R. Orme P.C., Mayer
ORME, SHAWN
Business Manager, Orme Ranch, Inc.; Community Volunteer; Former Educator, Mayer
OTWELL, WILLIAM
Architect, Otwell & Associates, Prescott
PHILLIPS, JEAN N.
Business Manager, Yavapai Medical Foundation; Community Volunteer; Past Pres., Prescott Town Hall, Prescott
PINNEY, CONSTANCE
Certified Public Accountant, Constance Pinney, C.P.A., P.C., Prescott
PRUDHOMME-BAUER, ROBYN
Chairperson, Verde Valley Regional Economic Organization, Clarkdale
ROONEY, JAMES (CASEY)
Director, Economic Development, City of Cottonwood/Verde Valley
RUFFNER, GEORGE A.
Principal & Biologist, EcoPlan Associates, Inc., Prescott
SKOOG,HARVEY
Mayor, Town of Prescott Valley
SWENSON, LINDA C.
Former Program Manager, WACOG Head Start - Mohave County, Prescott
TARKOWSKI, LARRY
Town Manager, Prescott Valley
TOMLINSON, ANDREW D., JR.
Financial Consultant, Wealth Management, Prescott
TOMLINSON, CANDACE
Court Investigator, Yavapai County, Prescott
WHITMIRE, MARSHALL
Executive Director, Coconino County Sustainable Economic Development Initiative, Flagstaff
WILKINSON, VICKI A.
Rancher, Running W Ranch, Inc., Chino Valley

► YUMA COUNTY

AGUIRRE, ALICIA Z.
Attorney, Alicia Z. Aguirre, P.L.C., Yuma
AGUIRRE, AMANDA
Arizona State Senate (Dist. 24); President & CEO, Regional Center for Border Health, Inc., Yuma
BABIARS, BRIAN H.
Executive Director, Western Arizona Council of Governments (WACOG), Yuma
BENESCH, WAYNE C.
Attorney; Managing Director, Byrne, Benesch & Rice, P.C., Yuma
BRANDON, KATHERINE M.
President, Yuma Community Bank, Yuma
COLE, TOM
Ret. Judge, Yuma County Superior Court, Yuma
ELLIOTT, HAROLD L.
Harold L. Elliott Investments; Board Member & Former Chair, Arizona Automobile Assn., Yuma
ELLIOTT, MARION L.
Arts Consultant, Education & Management; Ret. Director, Art Dept., Yuma School Dist. No. 1, Yuma
ELLIOTT-NELSON, LINDA J.
Dean of Instruction, Arizona Western College, Yuma
ELNADRY, JEANNE N.
Physician, Hospice of Yuma
ENGEL, JULIE
President, Greater Yuma Economic Development, Yuma
FITZGERALD, CHARLENE
Executive Director, YMPO, Yuma
GRESSER, JUDY
Western Regional Manager, Arizona Community Foundation; Owner, Papa-San Rice Bowl, Inc., Yuma
GRESSER, WILLIAM
President, Yuma County Airport Authority; Owner, Papa-San Restaurants, Yuma
HOSSLER, DAVID J.
Attorney, Hunt, Vatterott-Grogan & Hossler, Yuma
HUDSON, JOHN I.
Commissioner, Arizona Power Authority; Lt. Gen., U.S. Marine Corps (Ret.), Yuma
INGOLD, ROBERT F., JR.
President & Owner, Sun River Investment Properties, L.L.C., Yuma
JOHNSON, MARCUS L.
Dean, Career & Community Educational Services, Arizona Western College, Yuma
JOHNSON, PAUL
City Council Member; Ret. Special Agent, II Anti-Smuggling Unit, U.S. Border Patrol, Yuma
JONES, RUSSELL L.
President/CEO, R.L. Jones Management Group; Arizona House of Representatives (Dist. 24), San Luis
LUCKIE, F. MACK
Executive Director, Yuma Metropolitan Planning Organization; Ret. Col., U.S.M.C., Yuma
MAGRINO, GARY J.
Owner, Multi Tech Transportation; Chair, Greater Yuma Port Authority, Yuma
MCCLOUD, RUSSELL
Yuma County Board of Supervisors District 2, Owner, Accurate Automotive Attention, Yuma
MCFARLAND, LINDA
Transportation Planner, Yuma Metropolitan Planning Organization, Yuma
MUNK, GARY E.
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President, The Communications Institute, Director, Governing Arizona Project funded by the Thomas R. Brown Foundation, Northridge, CA
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Arizona Town Hall Annual Report 2011

Pictured in this report:

Front Cover: Row 1, Board Members Zoe Richmond and Gilbert Davidson at 2011 Annual Meeting; Row 2, Participants of the Energy Town Hall; Row 3, Fall Luncheon speaker Hugh Downs with students; and Fall Luncheon attendees Devan and Joanne Wastchak; Row 4, Participants of the Energy Town Hall Jennifer Frownfelter and Steven Eddy.

Page 2: (left to right) Hank Peck, Michelle De Blassi, Lee Allison, Dennis Redmond

Page 3: (left to right) Susan Bitter Smith, Stephen Jennings, Katosha Nakai, Scott Rhodes

Page 4: (clockwise from upper left) Community Outreach Programs in Wickenburg, Kingman, and Phoenix

Page 6: (clockwise from upper left) Arts Town Hall: Report editor Betsey Fahlman addresses participants at Monday's Author's Breakfast; Panel Chair Mike Widener joins fellow Hedgehogs in a special performance at the Plenary Session; Sue Sisley and fellow members of Panel Ocotillo discuss the issues

Page 8: (clockwise from upper left) Energy Town Hall: Student participants report on the recommendations from the Youth Town Hall; Spencer Plumb proposes a change during the plenary session; Jennifer Frownfelter and fellow Participants work through proposed changes during the Plenary Session; Observer Amelia Huggins and Participant Mathew Buchwald at the Plenary Session

Page 10: (clockwise from upper left) Members at 2011 Annual Meeting discuss future Town Hall topics; Members listen to speakers present potential topics; NAU President John Haeger presents potential future topic "Higher Education"; Hugh Downs speaks to Fall Luncheon attendees

OUR MISSION

Arizona Town Hall is an independent nonprofit membership organization that identifies critical issues facing Arizona, creates the forum for education and exploration of the topic, and fosters leadership development.

By drawing upon Arizona's diversity of citizens, the Town Hall process promotes public consideration of these issues, builds consensus, and supports implementation of the resulting recommendations through its members.




What our members say Arizona Town Hall does best

"Creates a space for people with diverse perspectives to do a 'deep dive' into a complex set of issues. This should be the catalyst for pragmatic, constructive change and improvement in the quality of life in Arizona."

Patrick McWhortor, President and CEO, Alliance of Arizona Nonprofits, Phoenix

"Brings people together for intense discussion—the discussions are more important than the final 'product'."

Susan Goldsmith, Community Builder & Volunteer; Graduate Student, Arizona State University, Phoenix

"Assembles a broad spectrum of the Arizona population to consider problems impacting Arizona and derive recommendations to address those problems."

David Lincoln, Chairman, Lincoln Laser Co., Phoenix

"The process you use to build common ground is phenomenal!"

Toni Bouchard, State Director, Arizona Smart Power, Tempe

"Brings together a great diversity of well-informed people and important stakeholders, and immerses them in a subject in order to generate substantive and non-partisan recommendations for the state."

Laura Huenneke, Provost, Northern Arizona University, Flagstaff




"Working collaboratively to produce the recommendations report demonstrated absolute civic responsibility. I am a more informed citizen as a result of attending the Town Hall."

Todd Aakhus, Director, Community Partnership Programs, Rio Salado College, Surprise

Our commitment: Educate, Engage and Empower

Reaching out to Arizona communities to promote public consideration and implementation of Town Hall recommendations.

From January through March, 2011, programs were held throughout the state on the recommendations from the fall 2010 Town Hall, Arizona's Government: The Next 100 Years. Communities as diverse as Sierra Vista, Flagstaff, Yuma, Phoenix, Tucson, and the Verde Valley endorsed abolishing or restricting term limits, creating more competitive legislative districts, and taking specific measures to decrease political polarization and improve citizen engagement.

In May, the 98th Arizona Town Hall, Capitalizing on Arizona's Arts & Culture, convened in Tucson. Participants from the 98th Town Hall have already formed a "Next Steps" group that is actively working on accomplishing the specific recommendations from the 98th Town Hall.

From August through October, numerous programs were held throughout the state on the recommendations from the spring Town Hall, Capitalizing on Arizona's Arts and Culture. In addition to sharing key recommendations with Arizona communities, these programs also inspired local action and connected resources across the state.

Throughout the year, Arizona Town Hall was an active partner in Project Civil Discourse, a collaboration of organizations from around the state that provides training, forums, and special events on collaborative problem solving.

In November, the 99th Town Hall, Arizona's Energy Future, gathered at the South Rim of the Grand Canyon. Participants reached consensus on how Arizona can best meet its future energy needs and use the energy sector to bolster Arizona's economy. Recommendations from this Town Hall are already being utilized by the Arizona Energy Consortium as a roadmap for action. This Town Hall will be further discussed at programs throughout Arizona in 2012.

Town Hall reports were utilized as textbooks and professional resources for various institutions, organizations and businesses.

The Arizona Town Hall facilitated discussions for private and public organizations using the Town Hall's unique consensus building process.

When asked how past Town Hall participants have used their Town Hall experience,

76.9% of those responding said they shared recommendations with an elected leader.

88.4% said they shared recommendations with friends or coworkers.

65.3% became more civically engaged in their community or state.

73.0% used reports for meetings or to influence others.

57.6% took personal action as a result of the Town Hall.

65.3% participated in organized efforts in support of the Town Hall recommendations.

61.5% gained a new appreciation for the value of civil discourse.

38.4% changed their opinion on an issue as a result of the Town Hall experience.

88.4% made new professional or personal contacts with people in other professions or other parts of the state.

"Town Hall broadened the conversation and elevated awareness of the economic, historic, social and cultural impact of this vital issue [arts and culture]."

Dianne Cripe, Public Art Specialist, City of Goodyear

Capitalizing on Arizona's Arts and Culture

98th Arizona Town Hall
May 1-4, 2011
Tucson

This Town Hall was an opportunity for stakeholders in the arts and culture community to reconnect and re-energize themselves through discussions about the possibilities within their grasp to build and expand the creative sector as a contributor to Arizona's economy and quality of life.

Key Town Hall Recommendations

* This is a very brief summary of the recommendations. To view the full report, visit our website at ***www.AZtownhall.org***

Arts, Culture and Education

All schools must adhere to the existing state standards and policies that apply to arts curriculum.

Arts, Culture and the Economy

The Arizona tourism industry and arts and culture organizations should increase their partnerships and collaborations to raise the profile of Arizona's arts and culture sectors when marketing Arizona as a visitor destination.

Resources

Arts organizations should sign up for and participate in the Cultural Data Project and the Arizona Community Database.

Funding

Restore appropriations and the arts endowment to the Arizona Commission on the Arts.

Promote and Advocate

Increase statewide campaigns to raise awareness for the value of arts and culture and increased participation.

Other

Require public art as an element of government buildings and infrastructure.

Arts and culture organizations should work with regional planning organizations and the League of Arizona Cities and Towns to develop model ordinances and policy that support the arts.

Outcomes

- Participants formed a "Next Steps" group which developed action agendas around several of the major Town Hall recommendations.
- Participants are forming an arts and culture political action committee poised to raise money to contribute to arts-friendly candidates in the 2012 elections. Arizona Citizens/Action for the Arts is planning an extensive voter engagement and education effort.
- Alliance for Audience has stepped up its recruitment of arts organization participation in its Community Database project which records and analyzes audience behavior and demographics.
- The Arizona Commission on the Arts is spurring participation in the Pew Trust's Cultural Data Project which will help organizations strengthen their management capacity and demonstrate their value and impact in their communities.
- Conversations continue on how to convene a statewide process to address some of the major Town Hall recommendations around a unifying strategy for arts and culture.

Background report prepared by Arizona State University.
Special thanks to editor Betsy Fahlman.

"The process is well thought out and the years of experience produce a very good result."

Michael Curtis, Shareholder, Curtis Goodwin Sullivan Udall & Schwab, Phoenix

Arizona's Energy Future

99th Arizona Town Hall
November 6-9, 2011
Grand Canyon

Key Town Hall Recommendations

* This is a very brief summary of the recommendations. To view the full report, visit our website at ***www.AZtownhall.org***

Energy Policy
A clear set of core principles should guide Arizona's energy policy.

Promoting Energy Reliability, Security and Affordability
Maintaining and upgrading Arizona's energy infrastructure will be important for energy reliability, as will diversifying energy sources, decentralizing production, and reducing environmental impacts.

Leadership in Setting Energy Policy
Arizona should create or identify a body with the responsibility and authority to implement comprehensive energy policy.

Initiatives to Promote Energy Safety and Reliability
Encourage more distributed energy production.

True Costs of Energy
An energy life-cycle analysis is necessary for existing and potential energy options to incorporate externalities and incentives into energy pricing.

Arizona's Energy Economy
Policymakers and private enterprise should optimize the use of Arizona's competitive advantages in the energy industry to enhance the state's economy.

Energy Sustainability and Efficiency
Arizona's leaders must address environmental challenges through a balanced and integrative approach.

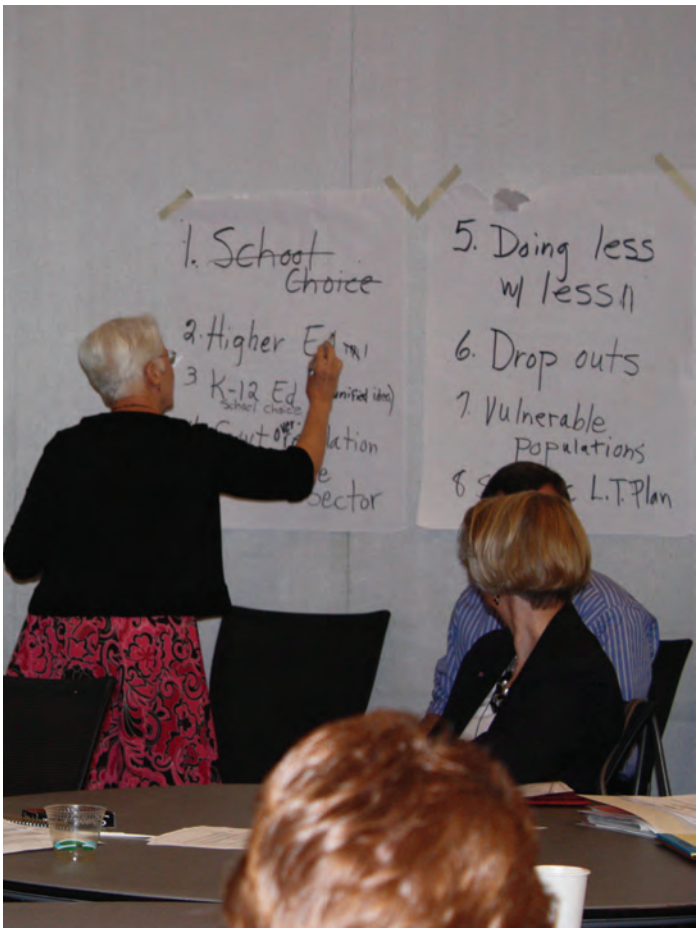
Energy Innovation
Arizona's research institutions, the private sector, and policymakers need to collaborate to further develop advances in energy innovation and emerging technologies.

Strategic Energy Plan
Arizona must develop a long-term, comprehensive energy plan that seeks to create a diverse, sustainable portfolio of energy generation with as close to zero carbon emissions as feasible(by mid-century).

Youth Town Hall

Partnerships with Arizona State University and Maricopa Community Colleges resulted in the Youth Town Hall designed to feed into the statewide Town Hall on Arizona's Energy Future. Approximately 200 students participated in the Town Hall-style discussions, which included students who were trained as recorders and panel chairs. Plans are in the works for expanded versions of the Youth Town Hall in 2012.

Background report prepared by Arizona State University.
Special thanks to editors Clark Miller and Sharlissa Moore.



"The Arizona Town Hall brings together decision makers from throughout the state—urban and rural—to discuss common concerns, listen to and learn from one another, and work to establish consensus on public policy."

Flo Eckstein, Publisher, Jewish News of Greater Phoenix

Identifying Critical Issues Facing Arizona and Supporting Implementation of Results

Annual Meeting and Selection of Town Hall Topics

In June 2011, Town Hall members convened for the Annual Meeting. Members welcomed new board members, and weighed in on future Town Hall topics. Highlights from the Annual Meeting included:

Presentations by:

- John Haeger, President, Northern Arizona University
- Richard Morrison, Attorney, Salmon, Lewis and Weldon, PLC; Episcopal Priest
- Dave Cole, Arizona State Solicitor General

Consideration of the following topics for future Town Halls:

- Higher Education
- Who is Responsible for Arizona's Vulnerable Populations?
- Arizona's Justice System

With input from the membership, the Executive Committee selected ***Higher Education*** as the topic for the Spring 2013 Town Hall.

Fall Luncheon: *A Day of Civic Action*

In September 2011, the Arizona Town Hall's Fall Luncheon played a key role in ***A Day of Civic Action*** — a collaboration with the O'Connor House, Flinn Foundation, Valley Leadership, and the Center for the Future of Arizona. The event was held in conjunction with the National Conference on Citizenship, which drew national speakers and attention to Arizona. Highlights from the event held on September 22, 2011, included:

- Keynote speaker ***Hugh Downs***, a long-time broadcaster with a career in television spanning 60 years, spoke about changes in the media;
- Presentation of the Shirley Agnos Legacy Award to ***Jamie Matanovich***, Consulting Psychologist for the Creighton School District in Phoenix;
- A successful silent auction made up of donated services and activities; and
- Raising approximately $40,000 for Arizona Town Hall.

Town Hall Topics and Publications

GOVERNMENT & TAXATION

Town Hall	Year	Title
1.	1962	*Arizona's Tax Structure— Revenue Needs and Revenue Sources
5.	1964	*Revision of Arizona's Constitution
11.	1967	*Arizona's Tax Structure & Its Administration
26.	1975	Responsive & Responsible Government—The Arizona Imperative
30.	1977	*Of, By & For the People—How Well Is It Working?
35.	1979	Toward Tax Reform
41.	1982	*Impact of the New Federalism on Arizona
45.	1984	County Government in Arizona: Challenges of the 1980s
58.	1991	Arizona's Taxing Choices: State Revenues, Expenditures & Public Policies
67.	1995	Public Spending Priorities for Arizona: Allocating Limited Resources
79.	2001	Pieces of Power – Governance in Arizona
83.	2003	The Realities of Arizona's Fiscal Planning Processes
95.	2009	Riding the Fiscal Roller Coaster: Government Revenue in Arizona
97.	2010	Arizona's Government: The Next 100 Years

EDUCATION

3.	1963	*Elementary & High School Education in Arizona
9.	1966	*Higher Education in Arizona
32.	1978	Cost & Quality of Elementary & Secondary Education in Arizona
42.	1983	Arizona Post Secondary Education in the Eighties
54.	1989	SOS: Save Our Schools . . . Save Our State
66.	1995	Making the Grade: Arizona's K-12 Education
76.	2000	Higher Education in Arizona for the 21st Century
84.	2004	Pre-K – 12 Education: Choices for Arizona's Future
92.	2008	Who Will Teach Our Children?

HEALTH CARE & SOCIAL SERVICES

2.	1963	Welfare Policies & Administration in Arizona
12.	1968	Mental Health & Emotional Stability
16.	1970	The Future of Health & Welfare in Arizona
23.	1973	*Cost & Delivery of Health Care in Arizona
44.	1984	Health Care Costs in Arizona
48.	1986	Social Services in Arizona: Increasing Needs—Changing Resources
55.	1989	Of Dreams, Deeds & Dollars . . . Achieving Better Mental Health Care in Arizona
62.	1993	Hard Choices in Health Care
72.	1998	Meeting the Challenges and Opportunities of a Growing Senior Population
74.	1999	Future Directions in Arizona's Health Care
82.	2003	Health Care Options: Healthy Aging—Later Life Decisions
89.	2006	Arizona's Rapid Growth and Development: People and the Demand for Services
90.	2007	Affordability and Accessibility of Health Care in Arizona

CULTURE & DIVERSITY

18.	1971	*The Arizona Indian People & Their Relationship to the State's Total Structure
21.	1972	*Arizona's Heritage—Today & Tomorrow
34.	1979	*Indians & Arizona's Future—Opportunities, Issues & Options
38.	1981	Arizona's Hispanic Perspective
50.	1987	Culture & Values in Arizona Life
51.	1987	Arizona's Relations with Northern Mexico
60.	1992	Harmonizing Arizona's Ethnic & Cultural Diversity
65.	1994	American Indian Relationships in a Modern Arizona Economy
75.	1999	Uniting a Diverse Arizona
77.	2000	Values, Ethics and Personal Responsibility
81.	2002	Arizona Hispanics: The Evolution of Influence
98.	2011	Capitalizing on Arizona's Arts and Culture

WATER

4.	1964	Arizona's Water Supply
31.	1977	Arizona Water: The Management of Scarcity
47.	1985	Managing Water Quality in a Water Scarce State
71.	1997	Ensuring Arizona's Water Quantity and Quality for the 21st Century
85.	2004	Arizona's Water Future: Challenges and Opportunities

ENVIRONMENT, NATURAL RESOURCES & LAND USE

6.	1965	*Gearing Arizona's Communities to Orderly Growth
7.	1965	Public Land Use, Transfer & Ownership in Arizona
17.	1970	*Preserving & Enhancing Arizona's Total Environment
24.	1974	*Land Use Planning for Arizona
28.	1976	Arizona Energy—A Framework for Decision
39.	1981	Arizona's Energy Future: Making the Transition to a New Mix
46.	1985	Growth Management and Land Use Planning in Arizona
52.	1988	Air Quality in Arizona
59.	1991	Preserving Arizona's Environmental Heritage
68.	1996	Arizona's Growth and the Environment – A World of Difficult Choices
88.	2006	Arizona's Rapid Growth and Development: Natural Resources and Infrastructure
91.	2007	Land Use: Challenges and Choices for the 21st Century
99.	2011	Arizona's Energy Future

TRANSPORTATION

13.	1968	Traffic & Highways
25.	1974	The Problems of Transportation: People & Products
36.	1980	Arizona's Transportation Dimension
70.	1997	Forging an Appropriate Transportation System for Arizona
94.	2009	From Here to There: Transportation Opportunities for Arizona

ECONOMIC DEVELOPMENT

10.	1967	Do Agricultural Problems Threaten Arizona's Total Economy
15.	1969	Economic Planning & Development
29.	1976	Arizona's Economy—Yesterday, Today & Tomorrow
49.	1986	Arizona's Changing Economy
57.	1990	The Many Faces of Economic Development in Arizona
61.	1992	Free Trade: Arizona at the Crossroads
78.	2001	Moving All of Arizona into the 21st Century Economy
86.	2005	Arizona as a Border State — Competing in the Global Economy
87.	2005	Maximizing Arizona's Opportunities in the Biosciences and Biotechnology
96.	2010	Building Arizona's Future: Jobs, Innovation & Competitiveness

CRIME & JUSTICE

8.	1966	*Crime, Juvenile Delinquency & Corrective Measures in Arizona
14.	1969	*Civil Disorders, Lawlessness & Their Roots
19.	1971	Alcohol & Drugs—Quo Vadis?
20.	1972	Arizona's Correctional & Rehabilitation Systems
22.	1973	*Adequacy of Arizona's Court System
27.	1975	The Problem of Crime in Arizona—How Do We Solve It?
33.	1978	*Corrections in Arizona: Crisis & Challenge
40.	1982	*Crime & Justice in Arizona
53.	1988	Civil Justice in Arizona—How Much? For Whom?
63.	1993	*Confronting Violent Crime in Arizona

ARIZONA'S YOUTH

64.	1994	*Youth At Risk: Preparing Arizona's Children For Success In The 21st Century
73.	1998	Who Is Responsible for Arizona's Children?

OTHER SUBJECTS

37.	1980	Toward the Year 2000: Arizona's Future
43.	1983	The Role & the Responsibilities of the News Media of Arizona
56.	1990	New Directions for Arizona: The Leadership Challenge
69.	1996	Building a Community of Citizens for Arizona
80.	2002	Building Leadership in Arizona
93.	2008	Housing Arizona

*Indicates publications no longer in print.

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We would like to express our appreciation to those entities providing Arizona Town Hall with grants for 2011.

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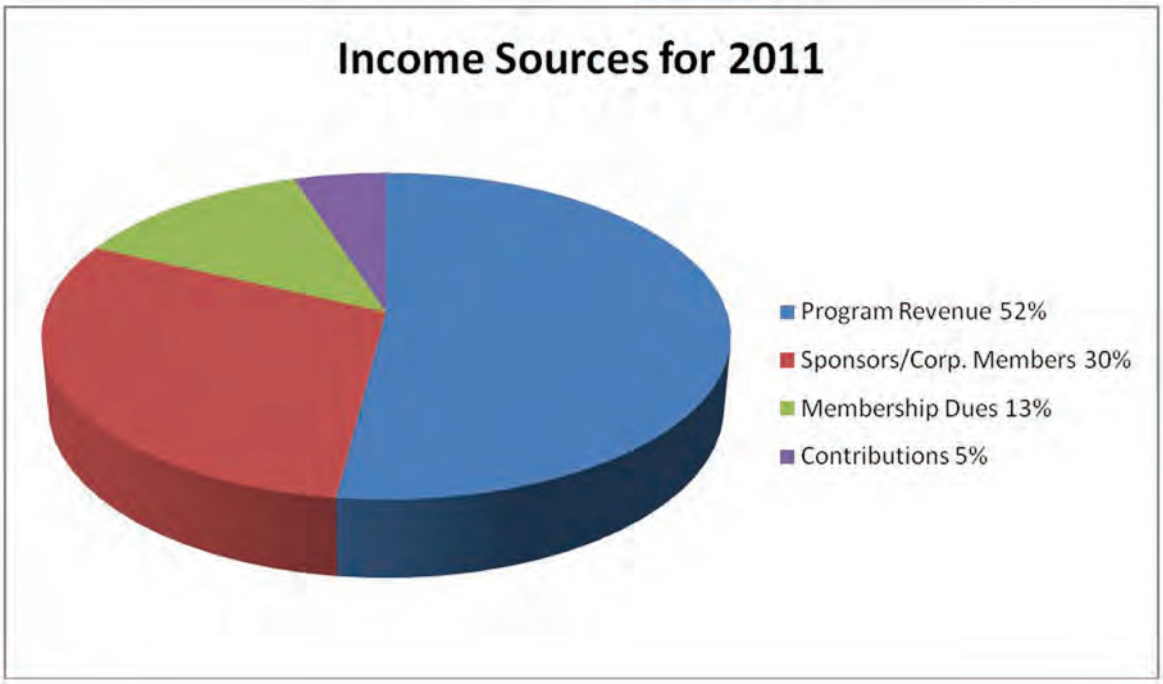

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Controller, Freeport-McMoRan Copper & Gold, Morenci

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University of Arizona students Dan Fitzgibbon and James Allen with Arizona Town Hall consultant Rhonda Bannard at the Fall 2011 Town Hall on Energy.

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MILLER, SCOTT
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MILLER, JAN
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MITCHEM, DENNIS
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MITCHEM, SCOTT
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MOORE, LAWRENCE
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MORGAN, EDWARD
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MORRILL, ANDREW
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MORRISON, ELAINE
Community Volunteer, Gilbert
MORRISON, RICHARD
Chairman, Morrison Institute Board, Gilbert
MOYA, P. ROBERT
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MURPHY, JOHN
Fmr. President & CEO, The Flinn Foundation, Phoenix
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NEIGHBORS, DEREK
Director, Gangplank Collective, Chandler
NEWMAN, PAUL
Commissioner, Arizona Corporation Commission, Phoenix
NOCK, JOHN
Ret. Sr. Vice President, Schaller Anderson, Inc., Phoenix
NORMAND, MIKE
Director, Community and Grant Services, Arizona Department of Transportation, Chandler
NORRIS, PATRICIA
Judge, Arizona Court of Appeals, Phoenix
NOWACZYK, CHRISTINE
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O'BRIEN, KATHLEEN
Administrator, Pediatric Surgeons of Phoenix, Phoenix
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OLIVAS, EVA
Executive Director, Phoenix Revitalization Corporation, Phoenix
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Attorney, Partner, Steptoe & Johnson, Phoenix
O'MEARA, KATHY
Attorney, Osborn Maledon P.A., Phoenix
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Director, Arts & Culture, City of Mesa; Executive Director, Mesa Arts Center, Mesa
ORTEGA, DAVID
Architect, David Ortega Architect & Associates, Scottsdale
OSBORNE, JOANNE
Vice Mayor, City of Goodyear
OWENS, STEPHEN
Director, Arizona Department of Environmental Quality; Attorney, Phoenix
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General Contractor; President, Paceley Constructors, Inc., Phoenix
PAINE, DEBBIE
Executive Director, Arts and Business Council of Greater Phoenix, Phoenix
PALMER, DIANE
President, James Palmer & Daughter Printing Co., Phoenix
PAN, SHOUAN
President, Mesa Community College, Mesa
PAPWORTH, JENNIFER
Student, Rio Salado Community College, Goodyear
PASTOR, ED
United States Congressional Representative, Phoenix/Washington, D.C.
PATTERSON, DANIEL
President, Patterson Arriba Inc., Chandler
PATTERSON, MARK
Architect; Principal, SmithGroup, Phoenix
PAYNE, TOBY
President, Technically Integrated, Inc., Cave Creek
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PETERS, KAREN
Government Relations Director, City of Phoenix
PFANNENSTIEL, RICK
Principal, Pfocus, LLC, Phoenix
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Customer Project Manager, Southeast Asia, Fujitsu Semiconductor Wireless Products, Tempe
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Vice President, Carefree Partners Investments, LLC, Phoenix
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Student, Glendale Community College; Teller, Bank of America, Glendale
POLLACK, ELLIOTT
President, Elliott D. Pollack & Co., Scottsdale
POLLACK, FRIEDA
Communication Specialist, Rodel Charitable Foundation of Arizona, Chandler
POORE, CAROL
President & CEO, Southwest Center for HIV/AIDS, Phoenix
PORTLEY, MAURICE
Judge, Arizona Court of Appeals, Phoenix
PRECIADO, AL
Precision Real Estate Inc., Glendale
PROSTROLLO, WARREN
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PROVINE, DORIS
Professor, Justice Studies, School of Social Transformation, Tempe
QUAN, LORI
Economic Development Specialist, City of Chandler
RAFFERTY, MARK
Principal, Kennedy Partners, LLC, Phoenix
RAGLAND, COLLEEN
Realtor, Realty Executives, Pointe Office, Paradise Valley
RAHIM, SUHAIL
Student, Mesa Community College, Gilbert
RALSTON, BARBARA
Chair, Blue Cross Blue Shield of Arizona Board; Former Chair, Arizona Town Hall, Phoenix
READ, WILLIAM
Senior Vice President, Research & Special Programs, Flinn Foundation, Phoenix
REDMOND, DENNIS
Vice President, Central Arizona Division, Southwest Gas Corporation, Phoenix
REES, JULIE
Principal, Triadvocates LLC, Phoenix
REGNER, JANET
Principal, Husk Partners Inc., Phoenix
RESNIK, DENISE
President, Denise Resnik & Associates, Inc., Phoenix
RHODES, SCOTT
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RHODES, THOMAS
Securities Broker, Fox & Co.; Clerk, Mesa Public Schools Governing Board, Mesa
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President and CEO, West Valley Art Council, West Valley/Phoenix
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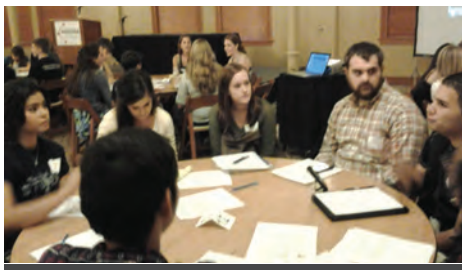
RICHARDSON, JUDY
Vice President, Public Finance, Stone & Youngberg, LLC, Phoenix
RICHERT, DAVID
City Manager, City of Scottsdale
RICHINS, DAVID
Director, Sun Corridor Legacy Program, Sonoran Institute, Phoenix
RICHMOND, ZOE
Director, Public Affairs, Union Pacific Railroad, Gilbert
RICKERT, ROCK
Vice President, Business Development, Delmastro + Eells Inc., Scottsdale
RIVERS, JOHN
Ret., President & CEO, Arizona Hospital & Healthcare Association, Phoenix
ROBBINS, PHILIP
Attorney, Philip A. Robbins, PC, Phoenix
ROBERTS, FRAN
Vice President, College of Nursing and Health Sciences, Grand Canyon University, Phoenix



Students discuss the topic of Energy at the Youth Town Hall in October 2011.

ROBERTSON, JACOB
Attorney, Perkins Coie Brown & Bain P.A., Phoenix
ROBEY, BARBARA
Ret. Director, Government Relations, Arizona School Boards Association, Inc., Litchfield Park
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President & CEO, Downtown Phoenix Partnership, Phoenix
RODERIQUE, RONALD
Ret. Sr. Vice Pres. & Dir. of Marketing, United Bank of Arizona, Phoenix
RODRIGUEZ, MARGARET
Founder & President, Miracle House Foundation, Chandler
ROGERS, JAMES
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Chairman, Helios Education Foundation, Phoenix
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ROOT, ROBERT
Ret. Research Psychologist, U. S. Army Research Institute (Alexandria, VA.), Litchfield Park
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IT Strategy Consultant, Royers and Associates, Phoenix
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Lobbyist, Copper State Consulting Group, Phoenix
RYND, MARY JANE
Executive Vice President/CFO, Virginia G. Piper Charitable Trust, Phoenix
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Co-Owner, Saba's Western Wear; Community Volunteer, Chandler
SALINE, KENNETH
President, K. R. Saline & Associates, PLC, Mesa
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Student, GateWay Community College, Scottsdale
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SCHEXNAYDER, CHAD
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SCHONAERTS, CLAIRE
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SCHROEDER, DAWN
Director, Arizona Biomedical Research Commission, Phoenix
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Community Volunteer; Homemaker, Phoenix
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City Council Member, City of Chandler
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Executive Director, Fiesta Bowl, Phoenix
SHULTZ, MARTIN
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President, James P. Simmons & Associates, Inc.; Former Chair, Arizona Town Hall, Paradise Valley
SIMMONS, PATRICIA
Community Volunteer; Homemaker, Paradise Valley
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Councilmember (District 4), City of Phoenix, Phoenix
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State Director, Arizona Bureau of Land Management, Phoenix
SULLIVAN, CRAIG
Executive Director, County Supervisors Association of Arizona, Phoenix
SULLIVAN, JOHN
Associate General Manager & Chief Resources Executive, Salt River Project, Phoenix
SULLIVAN, MARIE
President & CEO, Arizona Women's Education & Employment, Inc., Phoenix
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SURIANO, ALLISON
Principal, Kennedy Partners, Phoenix
SURIANO, THOMAS
Principal Hydrogeologist, Clear Creek Associates, Phoenix
SUTTON, BARBARA
Vice President, Jackson Financial Advisors, Scottsdale
SWEENEY, JAMES
General Manager, Maricopa Water District, Waddell
SWEENEY, SHERYL
Attorney, Ryley, Carlock & Applewhite, Phoenix
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TAPIA, DONALD
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TAYLOR, SUZANNE
Senior Vice President of Public Policy, Arizona Chamber of Commerce & Industry, Phoenix
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Senior Vice President, Walton Development & Management, Scottsdale
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President/Owner, Thoeny Management, Phoenix
THOMAS, KRISTINE
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THOMPSON, CHRISTINE
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WHEAT, RON
Field Ministry Representative, Military Ministry, Campus Crusade for Christ, Waddell
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WINZER, KIMULET
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Litchfield Park
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President, Arizona Education Association, Phoenix
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YOUNG, REINE
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ZARBIN, EARL
Ret. Newspaperman; Freelance Historian & Writer, Phoenix
ZORN, JAMES
President & CEO, HealthLogic Mobile Immunization Clinics, Scottsdale
ZWICK, CYNTHIA
Executive Director, Arizona Community Action Association, Phoenix
ZYLSTRA, STEVEN
President & CEO, Arizona Technology Council & AZTC Foundation, Phoenix

► MOHAVE COUNTY

ADAMS, LARRY
General Contractor, Pueblo Construction, Inc., Bullhead City
ALDRIDGE, CINDY
President, Information Solutions, Inc.; City Councilmember, Lake Havasu City
BALLARD, CHRISTINE
Planning & Zoning Director, Mohave County, Kingman
BETTS, SUSAN
Assistant City Manager, Bullhead City
BINDER, LINDA
Partner, Binder & Sickles Consultants, LLC; Former State Legislator, Lake Havasu City
BRADSHAW, GLENNIE
Secretary & Treasurer, American Graphics, Lake Havasu City
DURANCEAU, THOMAS
City Planning & Zoning Director, Kingman
EKSTROM, WILLIAM
Mohave County Attorney, Kingman
GEORGE, MAUREEN
Attorney; Board Member, Arizona Water Bank; Former City Attorney, Lake Havasu City
GRIFFIN, THOMAS
Owner, Griffin & Associates; Chairman, Mohave County Water Authority, Bullhead City
HLAVAC, DANA
Deputy County Manager, Mohave County, Kingman
HUMPHREY, BONNIE
Board Treasurer, Allied Arts Council of Lake Havasu City
HUMPHREY, WESLEY
Founder & Director, Lake Havasu Symphonic Winds, Inc., Lake Havasu City
JACKS, ROGER
Superintendent, Kingman Unified School District, Kingman
KEARNS, MICHAEL
President, Mohave Community College, Kingman
MCCABE, LISA
President, Bullhead Regional Economic Development Authority, Bullhead City
MCCORMICK, JOHN
Land Developer, McCormick Properties, Bullhead City
MCCORMICK, OLIVIA
Co-Owner, McCormick Realty; Former City Councilmember, Bullhead City
MURPHY, KEVIN
Associate Vice President, Project Director, PBS&J, Lake Havasu City
MURRAY, KATHLEEN
Realtor, Realty Executives, Kingman
NEXSEN, MARK
Mayor, Lake Havasu City
OTT, CATHY
Realtor, Century 21 Highland Realty Co., Kingman
SALEM, JOHN
Mayor, City of Kingman
SOCKWELL, TOM
County Supervisor, Mohave County, Bullhead City
WALKER, RON
Mohave County Manager, Kingman
WATSON, GARY
Supervisor (District 1), Mohave County, Kingman
WATSON, JANET
Councilmember, City of Kingman

► NAVAJO COUNTY

AFFELDT, ALLAN
Owner, La Posada; President, Monastery Hotels LLC; Fmr. Mayor, Winslow
BUTLER, GREG
Owner, Butler Farms Inc. (d.b.a. Timberline Ranch), Show Low
CARLYON, BRAD
County Attorney, Navajo County Government, Holbrook
HATCH, V. BLAINE
Vice President, Administrative Services, Northland Pioneer College, Holbrook
HEMENWAY, KATHY
Ret. Distinguished Engineer, Sun Microsystems; Private Public Policy Professional, Navajo County, Snowflake
JAYNE, JAMES
Navajo County Manager, Holbrook
LOPER, GREG
Planning Director/Deputy Director of Public Works, Navajo County, Holbrook
NEWLIN, DAVID
Watershed Projects Director, Little Colorado RC&D; Graduate Student, Northern Arizona University, Holbrook
TOCK, GREG
Publisher & Editor, The White Mountain Independent, Show Low
VELA, HOMERO
Director of Public Works, Navajo County, Holbrook
WHIPPLE, GERRY
Owner, Twin Electric; City Councilmember/Former Mayor, Show Low

► PIMA COUNTY

ABDI, ABDI ADEN
Executive Director, Somali Bantu Association of Tucson, Tucson
ALCOMBRIGHT, DANIEL
President & CEO, SOLON Corporation, Tucson
ALDRICH, LARRY
President, Aldrich Capital Company, Tucson
ALLEN, JAMES
Student, University of Arizona, Tucson
ALLISON, M. LEE
Director, The Arizona Geological Survey and State Geologist, Tucson
ALMQUIST, LAURA
Ret. Associate Director, Grants, Tucson Community Foundation, Tucson
ANDREWS, JESSICA
Interim Managing Director, Arizona Theatre Company, Tucson
ARMER, WALTER
Rancher, XX Ranch; Agricultural Appraiser & Broker, W.D. Armer & Associates, Vail
ARZOUMANIAN, LINDA
Pima County Superintendent of Schools, Tucson
ASHTON, HAROLD
President, Diversified Design & Construction, Inc., Tucson
AUSLANDER, EDITH
Consultant, Arizona Assurance, University of Arizona Foundation, Tucson
BAHILL, LARRY
Educator; Pima County Registrar of Voters; Former Minority Leader, Arizona House of Representatives, Tucson
BAILEY, MATTHEW
Executive Vice President, Water Policy, Farmer's Water Company, Sahuarita
BALENTINE, VICKI
Superintendent, Amphitheater Unified School District, Tucson
BARAJAS, MAGDALENA
Assistant to Supervisor Richard Elías, Pima County, District 5, Tucson
BARTLETT, DAVID
Ret. Attorney; Former Majority Whip, Arizona State Senate, Tucson
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BERNAL, JOHN
Tucson
BOGUTZ, ALLAN
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BOICE, FRED
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BOLDING, BETSY
Director, Consumer Affairs, Tucson Electric Power Co., Tucson
BOREK, THEODORE
Judge, Pima County Superior Court (Div. 24), Tucson
BOWLEG, VICTOR
Family Mediator, Pima County Superior Court, Tucson
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Member, Pima County Board of Supervisors (Dist. 3), Tucson
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BRUMM, BRAD
Dentist, Tucson
BRUNDAGE, JANICE
Psychologist; Owner, Madera Counseling Center, Tucson
BYRNE, KATHY
CEO, El Rio Community Health Center, Tucson
CAMPER, JOHN
Past President, Tucson Metropolitan Chamber of Commerce, Tucson
CANDEUR, EMILIE
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CANTON, CANDACE
Director of Administration, Mesch Clark & Rothchild PC, Tucson
CAPIN, ESTHER
Civic Leader; Ret. Mental Health Counselor, Nogales/Tucson
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Ret. Field Director, Congressman Jim Kolbe, Tucson
CARRELL, WILLIAM
Ret. Physician (Internist), Tucson
CASSIDY, FRANK
Town Attorney, Town of Marana
CERVELLI, JANICE
Dean, University of Arizona College of Architecture & Landscape, Tucson
CHAFFEE, FRED
President & CEO, Arizona's Children Association, Tucson
CHANN, SHIRLEY JO
Commissioner, Arizona Commission on the Arts; Ret. Professor, Pima Community College, Tucson

Town Hall Members consider upcoming topics at the 2011 Annual Meeting.

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CLANAGAN, RUSSELL
Councilmember, Town of Marana
CLARK, GARY
Vice President, Southern Arizona, Southwest Gas Corporation, Tucson
CLARK, W. MARK
President & CEO, CODAC Behavioral Health Services of Pima County, Inc., Tucson
CLARKE, RAYMOND
Regional Vice President, Amity Foundation; Fmr. President & CEO, Tucson Urban League, Tucson
COLTON, ARLAN
Planning Director, Pima County Development Services, Tucson
COYNE-JOHNSON, PATRICIA
College of Architecture & Landscape Architecture, University of Arizona, Tucson
COZINE, WILLIAM
Senior Loan Officer, Fairway Independent Mortgage Corp., Tucson
CUNNINGHAM, GEORGE
Consultant, Cunningham Consulting Group; Fmr. Deputy Chief of Staff, Arizona Governor's Office; Fmr. Arizona State Senator, Tucson
DALE, DEBORAH
Executive Director, Arizona List, Tucson
DALE, RICHARD
Physician (General & Vascular Surgery), San Rafael Medical Center, Tucson
DAVIDSON, GILBERT
Town Manager, Town of Marana
DAY, ANN
Supervisor, Pima County District 1, Tucson
DELIC, ELMA
Student, University of Arizona; Chair, Arizona Students' Association, Tucson
DIAMOND, DONALD
Chairman, Diamond Ventures, Inc., Tucson
DOBRAS, DARRYL
Chairman, DBD Investments, Inc.; Chairman, Arizona Commission on the Arts, Tucson
DOBRAS, MARY ANN
Community Volunteer; Ret. Psychiatric Nurse, Tucson
DUCOTE, RICHARD
Community Affairs Manager, Southern Arizona, Freeport-McMoRan Copper & Gold, Green Valley
DUNFORD, DAVID
Adjunct Professor, University of Arizona; Ret. U.S. Ambassador, Tucson
DUSENBERRY, BRUCE
Owner & CEO, Horizon Moving Systems, Tucson
DUSENBERRY, BRUCE
President, Horizon Moving Systems; Attorney; Immediate Past Arizona Town Hall Board Chair, Tucson
DUSENBERRY, KATIE
Exec. Vice President & Treasurer, Horizon Moving Systems, Tucson
EDDY, STEVEN
Environmental & Land Use Planner, Tucson Electric Power/ UniSource Energy Services, Tucson
EMERSON, KIRK
Environmental Policy Faculty Associate, Udall Center for Studies in Public Policy, The University of Arizona, Tucson
ENCINAS, EDUARDO
Agent, Old Adobe Realty, Tucson
ERVIN, YVONNE
Executive Director, Primavera Jazz Productions, Tucson
ESCHER, JOHN
Shareholder, Waterfall, Economidis, Caldwell, Hanshaw & Villamana, P.C., Tucson
ESCHER, PATRICIA
Retired Judge, Pima County Superior Court, Tucson
ESPOSITO, DAVID
Management Consultant, Empowering Leaders LLC, Tucson
ETHEN, LESLIE
Director, Office of Conservation and Sustainability, City of Tucson
EVEN, BRENDA
President, Downing Lane Enterprises, Inc., Tucson
FAHEY, GREGORY
Associate Vice President of Government Relations, University of Arizona, Tucson
FARLEY, STEVE
State Representative, Arizona State Legislature, District 28; Graphic Artist, Tucson
FINLEY, TONY
Chief Financial Officer, Long Companies, Tucson
FITZGIBBON, DAN
Student, University of Arizona, Tucson
FLORES, ROY
Chancellor, Pima Community College, Tucson
FRITZE, EMILY
Student, University of Arizona, Tucson
FULLER-MCBRIDE, EVELYN
Student, Pima Community College, Tucson
GEORGE, HARRY
Managing General Partner, Solstice Capital, Tucson
GIBSON, JACK
Director & General Manager, Arizona Public Media, University of Arizona, Tucson
GIFFORDS, GABRIEL
Fmr. Representative, U.S. House of Representatives, Tucson
GILLASPIE, BARRY
Councilman, Town of Oro Valley
GLASSMAN, RODNEY
City Councilmember (Ward 2); Founder and President, Glassman Foundation, Tucson
GODWIN, CINDY
President, Godwin Marketing, Tucson
GOMEZ, NICOLETTE
Student, Pima Community College, Tucson
GRASSINGER, MICHAEL
Principal and Chief Executive Officer, The Planning Center, Tucson
GRIFFIS, DAVID
Principal, Griffis Consulting, Tucson
GRIFFITH, ESTELLE
Retired, Tucson
GRINDELL, BETH
Director, Arizona State Museum, Tucson
GRIWZOW, BRITTANY
Student, Pima Community College, Tucson
GROSSETTA, GAIL
Retired President, Grossetta International, LLC, Tucson
GUTIERREZ, JAIME
Vice President, University of Arizona, Tucson
HAMMOND, MICHAEL
President, PICOR Commercial Real Estate Services, Tucson
HANCOCK, JORY
Dean, College of Fine Arts and Head, School of Dance, University of Arizona, Tucson
HARBOUR, ROBERT
Certified Public Accountant/Shareholder, Beach Fleischman P.C., Tucson
HARCLERODE, AMY
Development Director, The Loft Cinema, Tucson
HARRIS, CHARLOTTE
Retired Director of Development, Salpointe Catholic High School, Tucson
HARTGRAVES, LINDSAY
Student, University of Arizona, Tucson
HEALY, STEPHANIE
President, Hospital Council of Southern Arizona, Tucson
HECHLER, PAULINE
Vice President of Development, Community Food Bank, Tucson
HELLON, MIKE
President, Hellon & Associates, Inc.; Arizona Member, Republican National Comm., Tucson
HEMPHILL, MATTHEW
Student, Pima Community College, Tucson
HILLER, ROBIN
Executive Director, Voices For Education, Tucson
HINDERAKER, TED
Attorney, Partner, Hinderaker & Rauh, PLC., Tucson
HIREMATH, SATISH
Mayor, Town of Oro Valley
HONEA, ED
Mayor, Town of Marana
HOPPER, LISA
Executive Director, World Care, Tucson
HOWARD, JAMES
Ret. Attorney, Tucson
HUFFMAN, STEVE
Ex Officio Commissioner, Intergovernmental Affairs, Marana
HUGHES, ALISON
Director, Rural Health Office, University of Arizona; Commissioner, Arizona Commission on the Arts, Tucson
HURSH, JEFFREY
Attorney, Snell & Wilmer, Tucson
JACOBS, KATHARINE
Director, Arizona Water Institute; Professor, Soils, Water & Environmental Science, University of Arizona, Tucson
JACOME, FELIPE
Fmr. Southern Arizona Regional Director, Alzheimer's Association, Tucson
JENKINS, DAISY
Senior Vice President of Human Resources, Carondelet Health Network, Tucson
JOHNSON, ANDREW
Student, Pima Community College, Tucson
JOHNSON, BARBARA
General Manager of Public Services, Town of Marana
JOHNSON, PEGGY
Executive Director, Loft Cinema, Inc., Tucson
JOHNSON, PETER
Ret.. Senior Vice President & General Counsel, The Sundt Companies, Inc., Tucson
JOHNSTON, ROBERT
U.S. Marine Corps (Ret.), Tucson
JOLIVET, ANNA
Retired Assistant Superintendent, Tucson Unified School Dist., Tucson
JONES, PATRICK
Director, Office of Technology, University of Arizona, Tucson
JULIEN, ANGELA
Principal, Rincon High School, Tucson
JULIEN, PAUL
Judicial Education Officer, Arizona Supreme Court, Tucson
KAISER, DAVID
Student, Pima Community College, Tucson
KENDALL, SUZANNE
Tucson
KING, XENIA
Director, Art that Heals, Carondelet Health Network, Tucson
KISER, JAMES
Editorial Page Columnist, The Arizona Daily Star, Tucson
KISER, SHIRLEY
Former Executive Director, Tucson Education Association, Tucson
KITAGAWA, JOHN
Rector, St. Phillip's in the Hills, Tucson
KITAGAWA, KATHLEEN
Owner/Consultant, KAK Compensation Services, LLC
KITTLE, JAY
President, Palo Seco Corporation; Attorney, Tucson
KLEMMEDSON, ADALINE
Vice President, Administrative & Corporate Relations, University Medical Center, Tucson
KNIGHT, ROBERT
Executive Director, Tucson Museum of Art, Tucson
KOFFLER, HENRY
President Emeritus, University of Arizona; President, Arizona Senior Academy, Tucson
KORN, BEN
Promotional Specialist, Safeguard Tucson; President, Tucson Young Professionals, Tucson
KOZOLCHYK, BILLIE
Community Volunteer; Homemaker, Tucson
KRAUJA, GEORGE
Director, Fennemore Craig, P.C., Tucson
LATANE, JANE
Interim President, Tohono O'Odham Community College, Sells
LAWDER, SUZANNE
President & CEO, Goodwill Industries of Southern Arizona, Tucson
LEE, SYLVIA
President, Pima College Northwest Campus, Tucson
LIKINS, PETER
President Emeritus, University of Arizona, Tucson
LOOMIS, PAUL
Mayor, Town of Oro Valley
LOVALLO, LISA
Vice President for Southern Arizona, Cox Communications, Tucson
MAGNUSON, CHERYL
Member, Continental Elementary School District Governing Board, Green Valley
MARCOTTE, JANET
Executive Director, YWCA of Tucson
MARKS, SELMA
Community Volunteer; Ret. Deputy Pima County Attorney, Tucson
MARRS, JOAN
Executive Director, Catalina Foothills Community School District, Tucson
MARTIN, DAN
Financial Advisor, Greenburg Financial Group, Tucson
MARX, RONALD
Dean; Professor, College of Education, University of Arizona, Tucson
MCCUSKER, FLETCHER
Chairman & CEO, Providence Service Corp., Tucson
MCGORRAY, CAROL
Councilmember, Town of Marana
MCGRATH, MICHAEL
Attorney, Partner, Mesch, Clark & Rothschild, P.C., Tucson
MEDLER, ROBERT
Manager of Government Affairs, Tucson Metropolitan Chamber of Commerce, Tucson
MEGDAL, SHARON
Director, Water Resources Research Center; Professor, Agricultural & Resource Economics, University of Arizona, Tucson
MENDELSON, EVAN
Vice President, Donor Relations and Program Services, Community Foundation for Southern Arizona, Tucson
MERRYMAN, FRANCES
Vice President and Senior Wealth Strategist, Northern Trust Company, Tucson
MILCZAREK-DESAI, GAVIN
Partner, Quarles & Brady LLP, Tucson
MILEM, JEFFREY
Distinguished Professor and Department Head, Educational Policy Studies and Practice, College of Education, University of Arizona, Tucson
MILES, SUZANNE
Provost and Executive Vice Chancellor, University of Arizona, Tucson
MILWARD, H. BRINTON
Director, School of Government & Public Policy, University of Arizona, Tucson

MIRABEN, GEORGE
Consultant, Miraben Consulting; Ret. Senior Vice President & CAO, Illinova Corp.; Former Chair, Arizona Town Hall, Tucson
MONTAGUE, ERIK
Financial Director, Town of Marana, Marana
MOORE, JAMES
President & CEO, University of Arizona Foundation, Tucson
MORE, SARAH
Planning & Building Director, Town of Sahuarita
MORRISON, EMILY
Former Deputy Director for Education, The Arizona Aerospace Foundation, Tucson
MORROW, JAMES
Partner, Quarles & Bradley, LLP, Tucson
MURPHY, THOMAS
Attorney, Gust Rosenfeld PLC, Tucson
NELSON, ANNE
Senior Vice President, Investments, Smith Barney, Tucson
NILES, CLAYTON
President, Niles Investment Corp.; Owner and Designated Broker, CNN Realty Services, LLC, Tucson
NORVILLE, ALLAN
President, Financial Associates, Inc., Tucson
ORR, ETHAN
Executive Director, Linkages, Tucson
PARSONS, JAMES
Ret. Physician, Desert Medical Group, Ltd.; Past President, Pima County Medical Society, Tucson
PECK, BARBARA
Owner/Consultant, Barbara Peck Public Relations, Tucson
PECK, HENRY
Certified Financial Planner, TCI Wealth Advisors, Inc., Tucson
PECK, SHELBY
Teacher, Montessori School, Tucson
PETERSON, LEA
President /CEO, Tucson Hispanic Chamber of Commerce, Tucson
PICKENS, MARION
Ret. Teacher; Former Assistant Minority Leader, Arizona House of Representatives, Tucson
PIERSON, JOE (NICK)
CLU, Northwestern Mutual Retirement, Planning Specialist, Rancho El Mezquital, Tucson
PITT, DONALD
President, Cornerstone Capital Management Ltd., Tucson
PLACE, AMANDA
Development Consultant, Pima Library Foundation, Tucson
POLHEBER, RICHARD
Health Care Consulting, Tucson
POST, DEL
Deputy Town Manager, Town of Marana
PROCTOR, MICHAEL
Dean, Outreach College, University of Arizona, Tucson
PROUTY, TIM
President, CB Richard Ellis Tucson, LLC, Tucson
QUIROZ, ALFRED
Artist and Professor, Painting & Drawing, School of Art, University of Arizona, Tucson
RAMEY, APRIL MAY
Student, Pima Community College, Tucson
RAMIREZ, LETICIA
Independent Consultant, Strategy Resource Group, Tucson
RAULUK, VALERIE
CEO, Venture Catalyst Inc., Tucson
REUTER, BARBARA
Principal, Property Management Division, PICOR Commercial Real Estate Services, Tucson
RICHARDSON, JOAN
Retired, Tucson
RICHTER, WALTER
Administrator, Corporate Public Affairs, Southwest Gas Corporation, Tucson
ROBINSON, MARILYN
Associate Director, The Drachman Institute, University of Arizona, Tucson
ROBINSON, PRISCILLA
Ret. Consultant; Former Executive Director, Southwest Environmental Service, Tucson
RODGERS, JOEY
Co-Founder/Artistic Director, Dancing in the Streets AZ, Tucson
ROE, WILLIAM
Retired, Tucson
ROLLINS, KENT
President, University of Arizona Healthcare Foundation, Tucson
ROTHSCHILD, JONATHAN
Attorney, Mesch, Clark & Rothschild, P.C., Tucson
ROWLEY, JIM
Vice President, Circulation, Arizona Daily Star, Tucson
ROWLEY, MARY
President & Owner, Strongpoint PR, Tucson
RUBIN, MARK
Attorney, Mesch, Clark & Rothschild, Tucson
RULE, DENNIS
Inter-Agency Relations Manager, Central Arizona Project, Tucson
RYAN, DAN
Community Relations Director, Rosemont Copper, Tucson
SABLE, RONALD
President, Concord Solutions Ltd., Tucson
SANDER, EUGENE
President, University of Arizona, Tucson
SANDERS, KERI
Marketing Manager, CARF International, Tucson
SASSER, STEVEN
Student, Northern Arizona University, Flagstaff
SAXBERG, SHEILA
Vice President & Trustee, Tucson Museum of Art, Oro Valley
SCHAEFER, HELEN
Community Volunteer; Ret. Educator, Tucson
SCHAEFER, JOHN
Chairman, Research Corporation Technologies; President, Research Corporation, Tucson
SCOTT, CITA
Artist, Tucson
SHATTUCK, WANDA
Community Volunteer, Tucson
SHAW, LAURA
Senior Vice President, Tucson Regional Economic Opportunities (TREO), Tucson
SHIM, SOYEON
Director, John & Doris Norton School of Family & Consumer Sciences, University of Arizona, Tucson
SHOOPMAN, RONALD
President, Southern Arizona Leadership Council, Tucson
SHROPSHIRE, DONALD
President Emeritus, Tucson Medical Center; Former Chair, Arizona Town Hall, Tucson
SHROPSHIRE, MARY RUTH
Community Volunteer; Professional Storyteller, Tucson
SIDHWA, MOHUR
Political Activist, Integrated Personal Solutions, Tucson
SILVYN, KERI
Partner, Lewis and Roca LLP, Tucson
SIMMONS, SARAH
Judge, Pima County Superior Court, Tucson
SLANIA, MICHAEL
Attorney, Russo, Russo & Slania, P.C., Tucson
SMALLHOUSE, DAVID
Managing Director, Miramar Ventures, LLC, Tucson
SMALLHOUSE, SARAH
President, Thomas R. Brown Family Foundation, Tucson
SNELL, JOE
Executive Director, Tucson Regional Economic Opportunities (TREO), Tucson
SPARK, RONALD
Physician (Pathologist); Associate Clinical Professor, College of Medicine, University of Arizona, Tucson
SPRUNG, JENNIFER
Science Educator, Tucson Unified School Dist.; Adjunct Faculty, College of Science, University of Arizona, Tucson
STEGEMAN, MARK
Professor, University of Arizona, Eller School, Tucson
STORM, PRISCILLA
Vice President, Diamond Ventures, Inc., Tucson
STRATFORD, HERB
Arts & Culture Guy, KVOA.com, Tucson
SUNDT, JOHN
Principal, 1st Deed Funding, LLC, Tucson
SUTHERLAND, PAMELA
Economic Development Consultant/Lawyer, Downtown Tucson Partnership, Tucson
TANSIK, LINDA
Independent Accounting Professional, CPA, Tucson
THALASITIS, DEBORAH
Assistant Town Manager, Town of Marana
TOLBERT, LESLIE
Vice President, Research, University of Arizona, Tucson
TONG, THEODORE
Assoc. Dean and Professor, College of Pharmacy, University of Arizona, Tucson
TRASOFF, NINA
President, Trasoff & Associates, Tucson
TRAVIS, CHAD
Student, University of Arizona, Tucson
UNDERWOOD, RICHARD
Vice President, Underwood Bros., Inc. d.b.a. AAA Landscape & Arid Solutions, Tucson
VALENCIA, YADIRA
Student, Pima Community College, Tucson
VAN HOOK, T.
Community Development Director, Town of Marana
VANEGAS-FUNCHEON, OLIVIA
President, Tohono O'odham Community College, Sells
VATNE, CLARENCE
CEO, Marana Health Center, Marana
VIA, ANNE
Community Volunteer, Tucson
VILLEGAS, BETTY
Housing Program Manager, Pima County, Tucson
VOEVODSKY, REYN
Community Volunteer, Tucson
WALDEN, RICHARD
President, Farmers Investment Co., Sahuarita
WARD, KATHY
Manager, Economic Development & Communications, Town of Sahuarita
WARNER, ANNE
Principal, ACW & Associates, Tucson
WATERS, LOU
Vice Mayor, Town of Oro Valley
WATSON, JERENE
Interim Town Manager, Oro Valley
WAYNE, BARBARA
Ret. Principal, Palo Verde High Magnet School, Tucson Unified School Dist.; Education/Prevention/Community Development Consultant, Tucson
WELSH, DAVID
Executive Vice President, Tucson Regional Economic Opportunities (TREO), Tucson
WERNER, FRANCES
Community Volunteer; Former Professor, University of Vermont, Tucson
WEST, CAROL
Community Volunteer, Former City Council Member (Ward II), Tucson
WEST, NEIL
Ret., Physician, Tucson
WHEELER, ELLEN
Executive Director, Morris K. Udall Foundation, Tucson
WHITE, JOE
Ret., 3M Company, Tucson
WHITEHILL, JAMES
Attorney; Quigley & Whitehill, PLC, Tucson
WOLL, DANE
President & CEO, YMCA of Southern Arizona, Tucson
WOODARD, DUDLEY
Professor Emeritus, University of Arizona, Tucson
WORDEN, MARSHALL
Ret. Senior Officer, Policy & Strategic Initiatives, Office of the Associate Vice President for Economic Development, University of Arizona, Tucson
WRIGHT, BRUCE
Associate Vice President, Economic Development, University of Arizona, Tucson
WRIGHT, JOSH
Assistant to the Town Manager, Town or Marana
YOUNG, ANTHONY
Energy Manager, Amphitheater Public Schools, Tucson
YRUN, VIRGINIA
CEO, Southern Arizona Center Against Sexual Assault, Tucson
ZLAKET, THOMAS
Attorney, Law Offices of Thomas A. Zlaket, PLLC; Ret. Chief Justice, Arizona Supreme Court, Tucson

► PINAL COUNTY

BARBER, SCOTT
Administrative Services Director, City of Casa Grande
BELDEN, TOM
Director, Visual Arts Gallery, Central Arizona College, Casa Grande
BEVERIDGE, JACK
President & CEO, Empowerment System, Inc., Apache Junction
CASUGA, EVELYN
General Manager, Community Development and Customer Offices, Arizona Public Service Co., Casa Grande
DOOLITTLE, TERRY
County Manager, Pinal County, Florence
EIDE, GARY
Town Manager, Town of Kearny
EVANS, KEVIN
City Manager, City of Maricopa
GRIFFIN, MARQUISHA
Councilmember, City of Maricopa, Maricopa
HARTDEGEN, JIM
Director, Land Management & Public Relations, Electrical District No. 3; Founder, Hartdegen Group, Casa Grande

Arizona Town Hall Board member Hank Peck at the 2011 Annual Meeting in Tempe.

LEYVAS, MARGARITA
Director, Human Services Department, Maricopa County, Phoenix
MATHIS, CHRISTOPHER
Attorney, Law Office of Christopher H. Mathis, PLC, Oro Valley
MILLER, STEVE
General Contractor, SMP Developments, Casa Grande
MONTOYA, KARL
Mayor Pro Tempore, City of Casa Grande, Casa Grande
POWELL, DICK
Owner, Powell Feed & Supply; City Councilmember, Casa Grande
RHODES, EVERETT
Director, Project CENTRL, University of Arizona, Casa Grande
RIDGEWAY, MERRILYN
Ret.; Fmr. Member, Arizona Humanities Commission; Community Volunteer, Casa Grande
RIVES, JIM
President & CEO, Maricopa Economic Development Alliance, Maricopa
SIEGWARTH, MARK
Executive Director, Boyce Thompson Arboretum, Superior
SMITH, SANDRA
President and CEO, Pinal Partnership; Fmr. Member, Pinal County Board of Supervisors, Apache Junction
SNIDER, DAVID
Member, Pinal County Board of Supervisors; Ret. City Library Director, Casa Grande
STACY, WILLIAM
General Manager, Pinal County Electrical District #3, Maricopa
UHAN, NICKOLAS
Assistant Vice President-Business/Commercial Banker, M&I Bank, San Tan Valley
WHITE, GEORGIA
Dean, Professional & Technical Education, Central Arizona College, Case Grande

► SANTA CRUZ COUNTY
HEISS, RANDY
Town Clerk, Town of Patagonia
MAYNARD, JOHN
Supervisor, Santa Cruz County, Nogales
POLHEBER, RICHARD
CEO, Carondelet Holy Cross Hospital; Chief Strategic Officer, Carondelet Health Network, Nogales/Tucson
ROWLEY, JIM
Electrical Contractor, Elgin Energy, Elgin

► YAVAPAI COUNTY
BARNETT, TIMOTHY
CEO, Yavapai Regional Medical Center, Prescott
BAUER, ELLIE
Artist; President, LWV-Sedona and Verde Valley
BLUFF, MICHAEL
Attorney, Law Office of Michael R. Bluff; Vice Pres., Mingus Constructors, Inc., Clarkdale
BROWNRIDGE, ALYCE
Head of The Orme School of Arizona, Mayer
BUNKER, JAMES
Former Mayor, Chino Valley
EDGMON, ROD
Education Director, Yavapai-Prescott Indian Tribe, Prescott
ELLEGOOD, MICHAEL
Director Emeritus, Maricopa County Transportation, Phoenix
FAIN, BILL
President: Fain Land & Cattle Co. and Shamrock Water Co.; Owner & Member, Fain Signature Group, Prescott Valley
FAIN, BRAD
Partner, Fain Signature Group, Prescott Valley
GRADY, HARVEY
President & CEO, Cornucopia Community Advocates, Sedona
GROSETA, ANDY
Rancher/ Agribusiness Owner, Cottonwood
HAYS, JOHN
Ret. Director, Arizona Dept. of Weights & Measures; Rancher, Yarnell
HILLER, JOEL
President, Arizona Action for the Arts; Manager, JKH Associates, Prescott
JOENS, DIANE
Mayor, City of Cottonwood
KUEHL, MARTINA
Consultant, Kuehl Enterprises LLC, Humboldt
LINN, TAMMY
Councilperson, City of Prescott; Executive Director, United Way of Yavapai County, Prescott
MEDOW, PAULETTE
Realtor, Russ Lyon Realty, Sedona
MILLER, BENJAMIN
Manager, Real Estate & Investments, Miller Bros., LLC, Sedona
MILLER, BEVERLY
Realtor, Foothills Real Estate & Investments, Sedona
MILLER, DUANE
Partner, Miller Bros. Investments & Real Estate; Former Chair, Arizona Town Hall, Sedona
MOSLEY, CHARLES
Director of Public Works/City Engineer, City of Sedona
NEWTON, RAY
Professor/Administrator Emeritus, Northern Arizona University, Flagstaff
ORME, PAUL
Attorney, Paul R. Orme P.C., Mayer
ORME, SHAWN
Business Manager, Orme Ranch, Inc.; Community Volunteer; Former Educator, Mayer
OTWELL, WILLIAM
Architect, Otwell & Associates, Prescott
PHILLIPS, JEAN
Business Manager, Yavapai Medical Foundation; Community Volunteer; Past Pres., Prescott Town Hall, Prescott
PINNEY, CONSTANCE
Certified Public Accountant, Constance Pinney, CPA, P.C., Prescott
PRUD'HOMME-BAUER, ROBYN
Chairperson, Verde Valley Regional Economic Organization, Clarkdale
ROONEY, JAMES
Director, Economic Development, City of Cottonwood/Verde Valley
RUFFNER, GEORGE
Principal & Biologist, EcoPlan Associates, Inc., Prescott
SKOOG, HARVEY
Mayor, Prescott Valley
STRAUCH, ERNEST
Vice Chair, Sedona Sustainability Commission; Ret. Vice-Mayor of Sedona
SWENSON, LINDA
Former Program Manager, WACOG Head Start - Mohave County, Prescott
TARKOWSKI, LARRY
Town Manager, Prescott Valley
TOMLINSON, ANDREW
Financial Consultant, Cities & Towns, Prescott
TOMLINSON, CANDACE
Court Investigator, Yavapai County, Prescott
WHITMIRE, JANE
Student, Camp Verde
WHITMIRE, MARSHALL
Executive Director, Coconino County Sustainable Economic Development Initiative, Camp Verde
WILKINSON, VICKI
Rancher, Running W Ranch, Inc., Chino Valley

► YUMA COUNTY
BABIARS, BRIAN
Executive Director, Western Arizona Council of Governments (WACOG), Yuma
BENESCH, WAYNE
Attorney; Managing Director, Byrne, Benesch & Rice, P.C., Yuma
COLE, TOM
Ret. Judge, Yuma County Superior Court, Yuma
ELLIOTT, MARION
Arts Consultant, Education & Management; Ret. Director, Art Dept., Yuma School Dist. No. 1, Yuma
ELLIOTT-NELSON, LINDA
Dean of Instruction, Arizona Western College, Yuma
ELNADRY, JEANNE
Physician, Hospice of Yuma
ENGEL, JULIE
President & CEO, Greater Yuma Economic Development, Yuma
FITZGERALD, CHARLENE
Executive Director, YMPO, Yuma
GRESSER, JUDY
Western Regional Manager, Yuma Community Foundation, Yuma
GRESSER, WILLIAM
Owner, Papa-San Restaurants, Yuma
HOSSLER, DAVID
Attorney; Hunt, Vatterott-Grogan & Hossler, Yuma
HUDSON, JOHN
Commissioner, Arizona Power Authority; Lt. Gen., U.S. Marine Corps (Ret.), Yuma
INGOLD, ROBERT
President & Owner, Sun River Investment Properties, LLC, Yuma
JOHNSON, MARCUS
Dean, Career & Community Educational Services, Arizona Western College, Yuma
JOHNSON, PAUL
City Council Member; Retired Special Agent, II Anti-Smuggling Unit, U.S. Border Patrol, Yuma
JONES, RUSSELL
Russell L. Jones Customhouse Brokers; Arizona House of Representatives (Dist. 24), San Luis
KRIEGER, ALAN
Mayor, City of Yuma
LUCKIE, F. MACK
Executive Director, Yuma Metropolitan Planning Organization; Ret. Col., U.S.M.C., Yuma
MAGRINO, GARY
Owner, Multi Tech Transportation; Chair, Greater Yuma Port Authority, Yuma
MAYLE, GLENN
President, Arizona Western College, Yuma
MCCLOUD, RUSSELL
County Supervisor, Yuma County; Owner, Accurate Auto Attention, Yuma
MUNK, GARY
Real Estate Broker, Gary Munk Real Estate & Investments, Yuma
NELSON, RANDY
Director, Small Business Development Center, Arizona Western College, Yuma
NIGLIAZZO, MARC
President, Arizona Western College, Yuma
NORTON, DUNBAR
Owner, Norton Consulting, Yuma
PARSTON, MARK
Vice President of Planning & Business, Yuma Regional Medical Center, Yuma
PROCHASKA, KATHRYN
Chair, Yuma County Board of Supervisors (Dist. 3), Yuma
PRUITT, ALAN
Economic Development Director, Western Arizona Economic Development District, Yuma
SHILL, SCOTT
Cattle & Feedyard Manager, McElhaney Cattle Co., Wellton
STUART, LENORE
Supervisor, District 1, Yuma County Board of Supervisors, Yuma
SWEET-MCGREGOR, DENISE
Executive Director, Arizona Western College, Yuma
WAIT, ROSS
Broker, Yuma East Real Estate; President, Foothills Home Sales, Inc., Yuma
WALZ, PATRICK
Chief Financial Officer, Yuma Regional Medical Center, Yuma
WHISLER, RUTH
Director, Human Resources, Arizona Western College Foundation, Yuma
WILMOT, LEON
Chief Deputy, Yuma County Sheriff's Office, Yuma

► OUT OF STATE
BENNETT, MARTHA
Owner, Bennett and Company, Lake Havasu City (relocated to VA, June 2010)
BRITTON, GEORGE
Retired City Manager, Modesto, California
GILMAN, RICHARD
Organizer, Thinking Arizona, Newton, MA
GODFREY, MARIAN
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Creating Solutions with Direction from Leadership

JUNE 2011 – JUNE 2012

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ARIZONA TOWN HALL
Creating Solutions for 50 Years!

Board of Directors Handbook 2012-2013

ARIZONA TOWN HALL'S MISSION

Educate. Engage. Empower.

Arizona Town Hall is an independent nonprofit membership organization that identifies critical issues facing Arizona, creates the forum for education and exploration of the topic, and fosters leadership development.

By drawing upon Arizona's diversity of citizens, the Town Hall process promotes public consideration of these issues, builds consensus, and supports implementation of the resulting recommendations through its members.

Pictured on the front cover:

Row 1: Technology Chair Toby Payne and Board Member Andy Groseta
Row 2: Board Members Zoe Richmond and Nick Pierson
Row 3: Board Chair Ron Walker and Executive Committee Member Lisa Atkins

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Board Member Len Kirschner with Eddie Sissons at the 100th Arizona Town Hall on Civic Engagement

Executive Committee Member Hank Peck at 2011 Annual Meeting

Board Chair Ron Walker with students at 2011 Fall Luncheon

Welcome

Welcome to the Arizona Town Hall Board. As a member of this Board, you are part of a group that has shaped policy and served as a catalyst for significant change for five decades. We're pleased to be celebrating our 50th year in 2012.

> *"Town Hall is a formidable vehicle for change. It is also (now, more than ever) becoming a vehicle for HOPE in our chaotic state (and sometimes local) government. It is what smart (as opposed to elected) community-based loyal citizens can do..."*
> *–Town Hall member*

As a board member and steward of this organization, you have an opportunity to connect with community, civic and business leaders from around the state. To get the most out of your Board experience:

- Attend board meetings, annual meetings, community outreach programs and other events so that you can connect with leaders from around the state and from different professions.
- Attend Town Halls as a participant or an observer to hear the latest in-depth discussions on issues facing Arizona.
- Provide names of potential Town Hall participants throughout the year, but especially when specifically requested.
- Serve as a host for a program in your community, business or organization or for a program at a Town Hall.
- Work with Town Hall to submit editorials or initiate action based on Town Hall recommendations so that you can be seen as a leader in creating solutions. You can also weigh in with ongoing dialogue on our Facebook page, through LinkedIn and Twitter.
- Leverage the impact of the Town Hall through strategic partnerships with programs, speakers, funding and publications.
- Capitalize on Town Hall's unique resources—especially the reports. Town Hall staff can also serve as a resource for programs, speakers, and Town Hall-style discussions for businesses, governmental entities, and other groups.
- Help staff to be more effective through direct contributions, in-kind services or providing ideas for grants and other funding.
- Help recruit more people into the dialogue with our open membership option. Tell your friends and colleagues that they can become a member of the Town Hall at any time.
- Offer your ideas for the Arizona Town Hall to increase its impact and effectiveness.
- Be an ambassador for the Town Hall's programs and mission.

Now, more than ever, the opportunity to find consensus and create solutions is needed. With your leadership, we'll have much to celebrate. Here's to 50 years!

ARIZONA TOWN HALL
Creating Solutions for 50 Years!

Overview

Arizona Town Hall serves as the forum for public policy engagement of Arizona's business, community and civic leaders by bringing together a broad cross-section of people with varied points of view from throughout the state. It is a private, non-profit, civic organization created in 1962 to establish, through research and discussion, an ever-growing body of Arizonans skilled in the process of thoughtful analysis and consensus building and well informed on the critical issues facing the state.

Twice each year, Arizona Town Hall brings together approximately 150 community leaders with diverse occupations and perspectives for a three-day Town Hall to address a topic of major concern to Arizona's future. The Arizona Town Hall also holds two Youth Town Halls in conjunction with the statewide Town Halls and between 30–50 Community Outreach Programs each year in communities throughout the state. These programs are designed to educate individual communities about the results of each Town Hall and inspire them to take positive action on the issues discussed.

Impact on Individuals

In a recent outcomes survey, we heard more about the personal impact of their Town Hall experiences.
Here is a sampling:

> *"It's made me more aware and appreciative of the passion people have for the issues we discussed. It was good to see people still care and want to make a difference."*
>
> *"I'm an Arizona native and have never felt better about my state and privileged to have played a part."*
>
> *"The connections I made at Town Hall are hopefully turning into rich friendships that are going to last a lifetime, These are individuals who are making a difference in their communities throughout the state. I believe together we are contributing toward those changes!"*
>
> *"I have learned how to work with groups utilizing the Town Hall process of civil discourse to arrive at a consensual, group-based decision."*
>
> *"Because of the Town Hall, I am more motivated in school and in life in general."*

Impact on Public Policy

Arizona Town Hall has served as a catalyst for discussions and recommendations that have influenced significant changes in Arizona's public policy over the years, and has been cited by countless local, state, and national leaders as a significant factor in educating people about the multiple facets of complex issues and fostering the development of personal and professional leadership skills.

Arizona Town Hall is not a lobbying organization and enactment of Town Hall findings is not a primary purpose of the organization. However, Town Hall participants and members are encouraged to engage in follow-up activities to implement Town Hall recommendations.

The opportunity Arizona Town Hall provides to discuss controversial topics in a civil manner has fostered a heightened level of understanding and responsibility among the people of Arizona. While no one person or organization can claim total responsibility for political change, for almost fifty years Arizona Town Hall has helped facilitate consensus on many major issues of importance to Arizona's future. The following are examples of laws, policies, actions and programs that have been implemented subsequent to Town Halls on related topics:

- Establishment of the Arizona Department of Revenue.
- Voluntary contributions for multipurpose districts (payment of in-lieu taxes).
- Creation of the Arizona Water Commission.
- Development of current method for selecting judicial candidates for the state's two most populous counties
- Establishment of the Ground Water Management Act that provided for the creation of the Department of Water Resources.

- Establishment of a statewide jobs training program.
- Authorization of motor fuel tax increases to fund freeway expansion in the Maricopa County area.
- Creation of an Arizona Department of Environmental Quality. (Suggestion for this department was made at the 47th Town Hall on water quality; further suggestions for the department's responsibilities were highlighted at the 52nd Town Hall on air quality and the 59th Town Hall on the environment.)
- Creation of an economic development, international trade and tourism committee within the Arizona House of Representatives.
- Passage of the Juvenile Crime Omnibus Bill, termed by many professionals as the most significant reform of juvenile crime measures in many years.
- Passage of an initiative on the 2000 ballot regarding reform of Arizona's redistricting process.
- Further talks for negotiating tribal water claims.
- "Growing Smarter" legislation to strengthen urban planning and provision for open space.
- Establishment of the Governor's Transportation Vision 21 Task Force.
- Appointment of the Governor's Water Management Commission.
- Proposition 301 establishing increased education funding passed following a Town Hall that recommended "improved education… requires commitment, leadership and most importantly a substantial increase in funding for higher education."
- Passage of a bill that addresses the fiscal policy and tax concerns expressed in a number of Town Halls.
- Action by the Arizona Department of Commerce to organize and oversee a statewide economic study.
- Encouragement of legislation to authorize the Secretary of State to establish a statewide directory for medical advance directives.
- Authorization of motor fuel tax increases to fund freeway expansion in Maricopa County area.
- Adoption of the "Rules of Civil Procedure" that are designed to speed civil court cases and cut costs.
- Announcement of the creation of the Sedona Cultural Park.
- Passage in the 1994 Special Legislative Session of a number of bills centering on "youth at risk" issues.
- Formation of Science Foundation with the hiring of Dr. William Harris as its first President and CEO.
- Dedication of $35 million by the Arizona State Legislature plus private-fund pledges toward the development of the bioscience and biotechnology industry.
- Establishment of the UA College of Medicine-Phoenix.
- Establishment of the "Move On When Ready" initiative for Arizona students.
- Passage of the one-cent state sales tax in 2010 to address Arizona's budget crisis.
- Preservation of the merit selection system, which was under attack during the 2010-2011 legislative session.
- Participants of the Arts and Culture Town Hall formed a "Next Steps" group which developed action agendas around several of the major Town Hall recommendations.
- An arts and culture political action committee is being formed to raise money to contribute to arts-friendly candidates in the 2012 elections. Arizona Citizens/Action for the Arts is planning an extensive voter engagement and education effort.
- Recommendations from the 99th Arizona Town Hall on Energy and the 100th Town Hall on Civic Engagement are being used by stakeholders as a roadmap for policy changes and community action.

Research and Topic Selection

An annual poll of the membership and panel discussions at the annual meeting provide input on future topics.

After the Executive Committee selects upcoming topics, one of the state's three universities develops a comprehensive, objective research document on each subject. This important contribution by the universities plays a strategic role in the development of each Town Hall.

The research report is sent to participants to read in advance of the Town Hall, which provides a common base of knowledge about key issues. The research report is also included in the final report generated by each Town Hall and made available to Arizona Town Hall members, elected officials, public libraries, and the general public. Recent reports are available for download, free of charge, at www.aztownhall.org.

Town Hall Process

Each Town Hall follows a carefully developed process. Participants meet in small panels for four sessions over a two-day period, all using the same discussion questions. The composition of each group is designed to ensure that participants represent multiple perspectives. A panel chair moderates each group's discussion and encourages informed contributions and careful listening. A panel recorder listens for and articulates points of consensus expressed in the discussion. The working definition of consensus is that no one has anything to add and no one strongly objects to the wording. The Training Committee ensures that panel chairs and recorders are highly skilled in executing the Town Hall process.

The consensus statements generated by each panel are synthesized each day by the panel recorders, and report chairs. The end result is a draft report that is provided to participants early in the morning of the third day. The entire assembly meets in a plenary session to adopt a final report of findings and recommendations. While not every participant agrees with each conclusion and recommendation, the report reflects a significant degree of consensus. When consensus is not possible, the Town Hall discussions help to crystallize subject areas that require additional education and discussion.

Individual Value

Arizona Town Hall allows individuals to set aside the adversarial stances often assumed on controversial topics, and instead to focus on finding areas of agreement and seeking workable solutions. Participants have an opportunity to experience first-hand the advantages of building relationships and engaging in civil discussions based on an in-depth understanding of key issues. The skills developed in this process have wide applications in professional and community settings. The outcome is enhanced individual expertise and a heightened level of understanding and sense of responsibility among Arizona's citizens.

College students are invited to participate in each Town Hall. Arizona Town Hall is a unique opportunity for participants of all ages to learn and become experienced in the process of consensus building, and it is especially valuable to students as they prepare for their careers. The experience allows students to meet and develop relationships with community leaders from throughout the state who they otherwise might not encounter.

Funding

Arizona Town Hall is a 501(c)(3) non-profit organization supported by individual and corporate membership, corporate sponsorship, foundation grants, in-kind donations, consulting services and other revenue sources. Contributions are tax deductible.

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Biographies

Karen Abraham

Karen Abraham, as senior vice president and chief financial officer at Blue Cross and Blue Shield of Arizona, is responsible for providing direction and accountability for all financial management as well as leadership in determining a strategic financial business direction for the company.

Karen graduated from Arizona State University in 1979 with a Bachelor of Science degree in Accountancy. She is a member of the Arizona Society of Certified Public Accountants and the American Institute of Certified Public Accountants. Karen serves as a member of the YMCA Metro board and as Secretary/Treasurer of the Phoenix Public Library Foundation Board. She currently serves on the WP Carey School Finance Advisory Board, and as Treasurer of the Arizona Society of Certified Public Accountants. She also serves on numerous committees for the Blue Cross and Blue Shield Association.

Allan Affeldt

Allan is the owner of the historic La Posada Hotel in Winslow. He is also the President and owner of El Garces Hotel LLC, and Monastery Hotels LLC. and a former Mayor of Winslow. He has served on the Boards of the Museum of Northern Arizona, Arizona Citizens for the Arts, and Arizona Humanities Council, and is founder and chair of the Winslow Arts Trust. He is a past President of EOS Institute, and International Peace Walk. He received his education at the University of California, Irvine.

Shirley Agnos, Ex Officio Board Member

Shirley is President Emerita of the Arizona Town Hall. Born in Columbus Grove, Ohio, she attended International College, Phoenix College, Arizona State University (BA, MBA), and received an Honorary DHL from Northern Arizona University.

She is a Member of Soroptimist International of Phoenix (Past President), Sun Health Foundation (Past Vice Chairman), and ASU West Dean's Advisory Council. Shirley is the Past Founding Board President of Tumbleweed, and a Past Board Member of Camelback Community Bank, Del E. Webb Hospital, Valley Leadership, Senior Olympics, and Community Council.

F. Rockne Arnett, Vice Chair, Development Committee -- Corp. Div.

As President of the East Valley Partnership, Roc leads a non-profit business coalition on issues of regional significance. Advocacy efforts in the East Valley are primarily focused on Economic Development, Education, Transportation, Williams Gateway Area, and Superstition Vistas issues. Prior to accepting the EVP assignment, Roc spent 38 years brokering risk and insurance services to clients of a range of complexity including self-insured programs as well as more traditional fully insured programs.

Roc, an Arizona native, lives in Northeast Mesa with his wife Sydney. They have five grown children and 19 grandchildren.

Lisa Atkins, Executive Committee

Born in Phoenix, Lisa Atkins is the Vice President of Public Policy for Greater Phoenix Leadership, Inc. She is a University of Arizona grad. Currently, she is the Co-chair of the Arizona Military Affairs Commission, is an elected Board Member of the Central Arizona Water Conservation Dist. (Central Arizona Project) and Secretary of the Arizona Water Bank Authority.

Steve Betts, Vice Chair - Administration

Steve is the retired President and CEO of SunCor Development Company, and a former land use and governmental affairs attorney with Gallagher and Kennedy and previously with Streich, Lang, P.A. He received his law degree with honors from DePaul University and his B.A. with honors from Augustana College.

Steve serves as the Chair of the Urban Land Institute Arizona District Council, incoming Chair of the Teach for America Arizona Board, President of the Interstate 11 Coalition, on the Executive Committee of the Greater Phoenix Economic Council. He has served on the Governors Growing Smarter Commission, received the first annual Most Admired CEO Award from The Business Journal, and twice received Planning Recognition Awards from the Arizona Planning Association for work on land use legislation.

Brian Bickel

Brian is the Chief Executive Officer of Southeast Arizona Medical Center. He has a B.S. in Medical Technology and a B.S. in Microbiology from the University of Arizona; and a Masters of Science in Interdisciplinary Studies from Texas Tech University.

Brian has served in the U.S. Army Reserve, the U.S. Naval Reserve, and the U.S. Marine Corps.

His community activities include: Douglas Rotary Club, Greater Douglas Chamber of Commerce, Arizona Town Hall, Southern Arizona Leadership Council, Nashville Rotary Club (President 2008–09), Nashville Chamber of Commerce, and Howard County Economic Development Committee.

Kerry Blume

Kerry is President and CEO of United Way of Northern Arizona (UWNA). Since 1998, Kerry has led UWNA to "improve lives by mobilizing communities to create lasting changes in community conditions" in Coconino, Navajo and Apache counties.

Kerry has a 30 year history in non-profit leadership. Kerry began her career in direct services, first working with seniors and then focusing on women's and children's issues and the movement to end domestic violence. Prior to joining United Way she worked for several philanthropic health foundations in Northern California on grantmaking and community building initiatives.

Kerry is a member of the Board of Directors for Arizona Grantmakers Forum. She also serves on the United Way Worldwide's National Professional Council and as Co-Chair for United Way Worldwide Inclusion Council. She holds a B.A. in Psychology from California State University, Sonoma, and a M.S. in Counselor Education, specializing in Marriage, Family and Child therapy, from California State University, Sacramento.

Richard (Rich) Bowen

Rich is the Associate Vice President for Economic Development and Sustainability at Northern Arizona University. Rich also serves as the President and CEO of the regional economic development organization the Economic Collaborative of Northern Arizona and serves on the Executive Committee developing the downtown Phoenix Bio-Medical Campus. Rich is a member of the Flinn Foundation Bio-Sciences Steering Committee, Flagstaff Chamber of Commerce Board, Boys and Girls Club Board, AZBio Government Affairs Committee, AAED Northern Committee, Sustainable Economic Development Initiative Board, Flagstaff Metropolitan Planning Organization Board, Governors Solar Advisory Board, and the Quality Connections Board.

Evelyn Casuga

Evelyn is General Manager, Community Development/Customer Offices at APS. Born and raised in Central California, Evelyn received her Masters of City and Regional Planning from the University of California, Berkeley and her undergraduate degree from the University of California, Santa Cruz.

Her current civic activities include Board memberships with the Business Development Finance Corporation, Casa Grande Regional Medical Center, Central Arizona Regional Economic Development Foundation-President, and Central Arizona College Foundation-Chair.

Evelyn and her husband, Jerry Stabley, and their son Justin reside in Casa Grande.

Arlan Colton

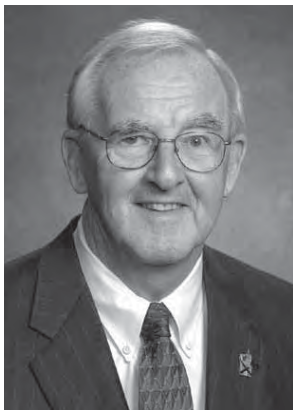
Arlan is the Planning Director for Pima County. He attended the University of Arizona (BS-Public Administration, MS-Urban Planning). He chairs the Arizona Association of County Planning Directors, serves on the Board of Imagine Greater Tucson, a non-profit called Friends of Planning, the UA College of Architecture and Landscape Architecture Dean's Advisory Board, and Urban Land Institute Southern Section Board. He is a Fellow of the American Institute of Certified Planners. Arlan served on the Arizona State Parks Board and is a Past President of the Arizona Planning Association; Past Co-Chair of the Governor's Growing Smarter Advisory Board; and Past Director of the American Planning Association.

Gilbert Davidson, Executive Committee
Tucson Chair, Development Committee - Southern Arizona

Gilbert is the Town Manager of Marana. Born in Phoenix, he attended the University of Gilbert is the Town Manager of Marana. Born in Phoenix and raised in Willcox, he attended the University of Arizona (M.P.A., B.S.P.A., B.S.B.A) and Harvard Kennedy School of Government Senior Executives in State and Local education program. He received his designation as a Credentialed Manager from the International City/County Management Association.

He is the past President of the Board of Directors for the Arizona City/County Management Association (ACMA), and serves on the University of Arizona National Alumni Board, Joan & David Lincoln Center for Applied Ethics Advisory Board, and the BIO5 Advisory Board.

Art DeCabooter, Chair, Development Committee, Chair, Development - Public Entities/Educ. Div.



Art retired in 2008 from serving as the President of Scottsdale Community College. Born in Omaha, Nebraska, he attended St. Gregory's Junior College (A.A.), St. John's University (B.A.), and Indiana University (M.S.Ed., Ed.D.).

He is a Life Time Trustee of The Virginia G. Piper Charitable Trust and the National Board of Visitors for Indiana University. Art also serves as the Chair of Xavier College Preparatory Capital Drive; McDowell Sonoran Preserve Commission in Scottsdale; the National Association of Boards, Commissions, and Councils of Catholic Educators; and City of Scottsdale Ad Hoc Ethics Task Force. He is on the Board of Scottsdale Area Chamber of Commerce, Community Celebrating Diversity, National Catholic Educational Association, Scottsdale Charros, Xavier College Prep Board of Trustees, and Xavier College Prep Board of Directors.

Eric Descheenie

Since 2003, Eric has built a young career in tribal government relations. He has held inter-tribal relations positions with the Arizona Governor's Office of Equal Opportunity and Arizona Department of Housing. Presently, Eric serves as Chief of Staff for the Office of the Speaker – 22nd Navajo Nation Council.

While originally from Chinle, Arizona located on the Navajo Nation Indian Reservation, Eric spent many years growing up in the East Valley – Phoenix Metropolitan area having graduated from Red Mountain High School and eventually Arizona State University. As a proud father to three beautiful sons – Sequoyah, Denali, and Na Koa – Eric looks forward to many Little League games and band recitals.

Trinity Donovan

Trinity Donovan serves as a Council Member for Chandler, Arizona. She currently represents the City of Chandler on a regional level as chair of the Maricopa Association of Governments Human Services Coordinating Committee and as a board member for both the Arizona Municipal Water User's Association and the Valley Metro Regional Public Transportation Authority. Trinity represents the City on a national level through her involvement in the National League of Cities' Community and Economic Development Committee and the Council on Youth, Education, and Families. Additionally, she chairs the STAR Community Sustainability Index Technical Advisory Committee for Health and Safety.

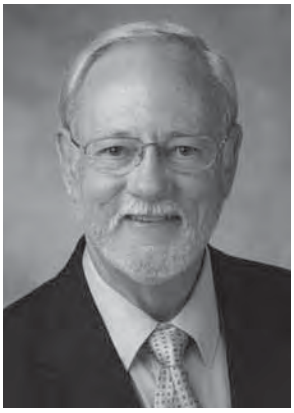
Trinity is also the Executive Director of Chandler Christian Community Center. Working in leadership positions with a variety of nonprofits for the past 10 years, Trinity has also been involved in many community coalitions in areas including financial stability, homelessness, domestic violence, early childhood, and youth development. She is active in her church and performs service projects internationally. Most recently, she traveled to Ethiopia with Hope for the Hopeless to work with an orphanage. Locally, Trinity volunteers for a variety of organizations including Big Brothers Big Sisters of Central Arizona as a Big Sister and is a member of the Chandler Service Club.

Shawn Dralle

Shawn is an Investment Banker with RBC Capital Markets in Phoenix. Born in Iowa, she attended Marycrest College, Davenport, Iowa (B.A.), and Arizona State University (M.P.A.).

Her current civic and volunteer board activities include Planned Parenthood of Arizona, Arizona Rural Development Council Board of Directors, and Phoenix Public Library Foundation Board of Directors.

Bruce Dusenberry, Immediate Past Board Chair (2009–2011)



Bruce is the President of Horizon Moving Systems in Tucson. Born in Tucson, Bruce attended UCLA School of Law (J.D.) and Occidental College.

He serves on the Board of Directors of the Southern Arizona Leadership Council (SALC), Tucson Regional Economic Opportunites (TREO) and Tucson Metropolitan Chamber of Commerce. He has also served on the Boards of other community organizations including the YMCA of Metropolitan Tucson, American Heart Association, Saguaro Rotary, Arts-Reach, West University Neighborhood Association, and the Southern Arizona Committee of Children's Action Alliance. Bruce is a member of the Tucson Airport Authority and past president of the DM-50. He was named the Tucson Chamber of Commerce "Man of the Year" in 2009.

Bruce is an instrument rated private pilot, a devoted U of A Wildcat fan and enjoys traveling with his family.

Linda J. Elliott-Nelson, Chair, Membership Committee

Linda is the Dean of Instruction at Arizona Western College, having previously served as the Division Chair of Modern Languages and Professor of Spanish. She attended Northern Arizona University (BA), Arizona State University (MBA, MA), and is a Ph.D. candidate (ABD) at Walden University. Prior to her college career, she worked in the international business sector.

Her activities include serving on the national committee for two-year colleges for the Modern Language Association, as treasurer for the Arizona Language Association and treasurer for the Arizona Academic Administrators Association, and as member of Arizona Articulation Task Forces on Languages and General Education. She speaks nationally on topics involving higher education.

Linda is a second generation Arizonan. She and her husband, Randy, have a son named Ben.

Julie Engel

Julie Engel is the President/CEO of the Greater Yuma Economic Development Corporation. In her tenure with Greater Yuma EDC, she has been directly involved in the creation of over 4000 new high wage jobs, over 1 million square feet of new industrial space and a capital investment to the region that surpasses $1.5 Billion

Julie's career in Economic Development follows five years of local government leadership and eight years of federal government leadership and policy regulations. Julie serves on the Workforce Investment Board, serves on the Yuma Regional Medical Center Board, the Yuma National Heritage Board and the Yuma STEAM Academy Board. In 2010 Julie was appointed by Governor Brewer to serve on the Rural Arizona Commerce Authority Board of Directors. Julie serves on the Arizona Association of Economic Development Board, is an active member of the International Economic Development Council serving on their Economic Development Research Partners Committee.

Julie is a graduate of the Economic Development Institute for Certified Economic Development. She obtained CEcD certification in May 2009.

Greg W. Falls, Chair, Training Committee

Greg is a member of the law firm of Sherman & Howard L.L.C., practices commercial and real estate litigation in the firm's Litigation Group, and is manager of the firm's Arizona offices. Born in Alexandria, Minnesota, he attended Arizona State University (BS-Production Operations Management), and the University of Arizona (JD).

Greg's professional activities include membership in The Federalist Society for Law and Public Policy Studies Arizona Advisory Board, University of Arizona James E. Rogers Law College Association Board of Directors, State Bar of Arizona (Bankruptcy and Real Property Sections), Association for Corporate Growth (Phoenix Chapter) and Valley Partnership.

Greg is married to Deedee Falls, Principal, PUHSD Bioscience High School. They spend their free time sailing (San Diego, the Caribbean and Cape Horn - once). Greg also enjoys gardening, wine collecting mixed with travel, and running marathons (ten and counting)

Jack Gibson

Jack is the Director and General Manager of Arizonan Public Media® (AZPM), the broadcast production resource of the University of Arizona in Tucson. He has developed a number of successful production projects earning him numerous accolades, including seven Emmy® Awards.

Jack has served on numerous industry and community Boards and Committees, including four terms as Governor for the National Academy of Television Arts and Sciences, Suncoast Chapter. He currently serves on the Board of Directors for the Children's Action Alliance in Phoenix, the Pacific Mountain Network (Colorado), the Advisory Board for the Friends of Saguaro National Park, and is Chair of the Nature, Arts, Culture, and Heritage Organizations (NACHO) in Tucson.

Jack earned his B.S. in Broadcasting with a minor in Management/Marketing from the University of Florida and is a graduate of the Corporation for Public Broadcasting's Executive Management Institute at the University of Wisconsin, Madison.

Mary Mangotich Grier, Vice Chair, Training Committee

Mary Mangotich Grier is an Assistant City Attorney for the City of Phoenix where she supports several City programs and departments. From 1994 through 2007 Ms. Grier served as an Assistant Attorney General representing the Arizona State Land Department in major litigation and real estate development matters. Before entering public practice Ms. Grier was a partner in two law firms in Tucson and Monterey, California.

Ms. Grier is a member of the Board of Directors of the Law College Association of the University of Arizona's James E. Rogers College of Law and of Soroptimist International of Phoenix, and serves as a member of the Arizona Supreme Court's Committee on Examinations.

Andy Groseta

Andy Groseta is a third-generation cattleman from Cottonwood. His family is one of the pioneer mining and ranching families that settled in north central Arizona. Andy's family ranching operation has included the Pine Creek Ranch, a stocker ranch, located north of Williams, Arizona, which was owned and operated by the family from 1980–2000; and the W Dart Ranch, a cow/calf operation headquartered in Cottonwood, that has been in business in the Verde Valley since 1922.

Since 1983, Groseta has been a partner in Headquarters West, Ltd., a statewide agribusiness firm specializing in farm and ranch brokerage, appraisals, management and consulting. Groseta has managed ranch properties throughout northern Arizona.

Groseta is a 1972 graduate of the University of Arizona with a B.S. in Agricultural Education and Animal Science and he received a Master's Degree in Agricultural Education in 1978.

Peter Hemingway

Pete is a Senior Vice President and Partner at Wood, Patel & Associates. He graduated from the University of South Carolina with a B.S. in Civil Engineering. He serves on the Board of Directors as the Vice President of Southeast Valley Youth Football. He is also on the Board of Directors of the Associated Minority Contractors of Arizona (Past Chairman), the Arizona Black Chamber of Commerce (Past Chair), Arizona Black Executives Magazine;. He is a Member of the African American Advisory Council to Governor Jan Brewer, the Conference of Minority Transportation Officials, the National Society for Professional Engineers, and the American Society of Civil Engineers.

In the past he has served as a member of the City of Chandler's Airport Commission (Past Chairperson), the Governor's Equity in State Contracting Initiative, and the Development Services Department Advisory Board for the City of Phoenix.

David Howell, Vice Chair, Communications & Marketing Committee

As Regional Director of State Government Relations for Wells Fargo & Co., Dave coordinates the Bank's government relations activities in eight states, including Arizona.

Dave earned both his bachelor's and master's degrees in journalism at the Medill School of Journalism at Northwestern University in Evanston, Illinois. He has taught as an adjunct professor at the Walter Cronkite School of Journalism and Telecommunications at Arizona State University. He also serves on the boards of Audubon Arizona, Big Brothers Big Sisters of Central Arizona, the Arizona Business and Education Coalition, Arizona Science Center, the Arizona Chamber of Commerce, the Arizona Tax and Research Association and is a member of the Fiesta Bowl Committee."

Dave and his wife, Joan, live in central Phoenix and have four children.

James G. Jayne

James (Jimmy) Jayne has been Navajo County Manager since September of 2003. Previously he served as Executive Secretary for the Arizona Corporation Commission and Chief of Staff for the AZ House of Representatives. Jayne also has worked with two members of Congress and the Arizona Water Banking Authority.

Jayne received his undergraduate degree from NAU, his MPA and Certified Public Manager Certification from ASU and Certificate of Completion for Senior Executives in State and Local Government from the Kennedy School of Government at Harvard.

Jimmy has been married to his high school sweetheart, Lisa, for 18 years. He is deeply committed to in his church and community, including serving on the Show Low Character First Council. He enjoys spending time outdoors with his wife and four children, especially on a family campout, hunting with one of his three sons or on the sidelines of a soccer, basketball, football, Little League game or track meet.

Ivan D. Johnson, Chair, Communications & Marketing Committee

A fifth generation native of Arizona, Ivan Johnson joined Cox Communications in 1980 as vice president of franchising. During his tenure with Cox Communications, he has served as vice president of community relations, manager of the Bullhead City system, state systems manager, regional operations manager for the East Valley, and manager of business development. In 1987, he was promoted to vice president of public affairs and business development. Since 1995, Johnson has been the vice president of community relations and televideo at Cox Communications Arizona.

He is Secretary of the Greater Phoenix Economic Development Committee; Chairman of Cox Charities; the past chairman of the Arizona State Chamber of Commerce; past chairman of the Greater Phoenix Chamber of Commerce; past chairman of WESTMARC; past president of the ASU MBA Council; board member of the W.P. Carey Dean's Council of 100 and past president of the Arizona Cable Television Association.

Johnson holds a Masters of Business Administration and has a Bachelor's Degree in political science from Arizona State University. He is married to Dr. Janet Johnson and they have three children.

Leonard J. Kirschner, Chair, Development Committee - Corp. Div.

Len is President of AARP Arizona and former Director of AHCCCS. He graduated from Williams College, Albany Medical College, and Harvard University School of Public Health. He is currently a Board Member of SCAN Health Plan Arizona, and Health Services Advisory Group. He is a member of the American Hospital Association Long Range Policy Committee, Arizona State Medicaid Advisory Committee, and a Trustee of the Arizona Perinatal Trust.

He served on active duty in the United States Air Force for 22 years commanding five Air Force hospitals before retiring in 1985 as Commander USAF Hospital Luke. His military awards include the Legion of Merit, Bronze Star, and Air Medal.

Kathy Kitagawa

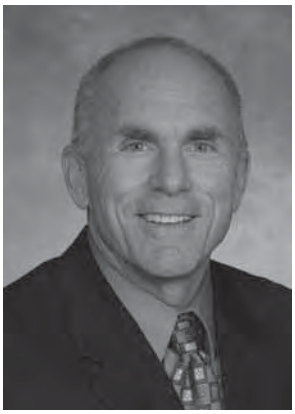
Kathleen Ann (Kathy) Kitagawa is a Certified Compensation Professional (CCP®) and the Owner of K.A.K. Compensation Services, LLC. Kathy supports organizations across Arizona with expertise in employee compensation strategy and program design along with competitive analysis. She founded her consulting practice in 1996, after working for Mercer Consulting and within corporate human resources at Zurich Insurance Group and The Rouse Company in Maryland.

A resident of Tucson since 2001, Kathy currently serves on the Boards of the Rotary Club of Tucson Foundation and Episcopal Community Services of Arizona. She is on the steering committee of Tucson Consultants Association, and serves on multiple committees with both the Rotary Club of Tucson and St. Philip's In The Hills Episcopal Church. Her professional association memberships include: World at Work and the Society of Human Resource Management (SHRM) and SHRM Greater Tucson.

Jay S. Kittle, Vice Chair, Research Committee

Jay is the President of Palo Seco Corporation in Tucson. Born in Indianapolis, Indiana, he attended Stanford University (A.B. Latin American Studies) and Stanford University (Law Degree). Currently, he is on the Board of Directors of the National Law Center for Inter-American Free Trade, John and Helen Murphey Foundation, and Tucson YMCA Youth Foundation. He also is a Member of the State Bar of Arizona, the Arizona-Mexico Commission and the Tucson Committee on Foreign Relations.

Joseph La Rue



Joe is the Executive Vice President of Sun Health and CEO of Sun Health Partners. Prior to joining Sun Health, he was an attorney practicing in the Sun Cities area for 16 years with an emphasis in real estate finance and development. After receiving his Bachelor of Science Degree in Business in 1985, Joe earned his Juris Doctorate from Arizona State University College of Law in 1988.

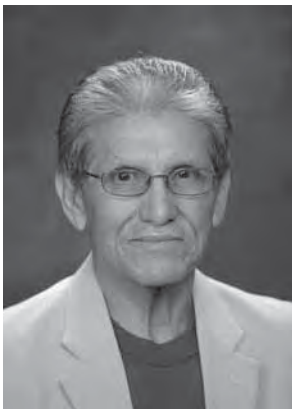
Joe is a member of the Maricopa County Transportation Advisory Board, representing Supervisory District 4. He is also a member of the Greater Phoenix Economic Council Healthcare Strategy Committee, and the WESTMARC Board of Directors and Transportation Committee. Previously, Joe was elected to a four-year term to the Peoria City Council in June 1997, representing the Ironwood District, and in 2005 he was asked by Peoria Mayor Keegan to serve as Chairman for the Peoria General Bond Committee.

Larry A. Lange, Chair, Finance/Audit Committee

Larry is the Finance Director for the City of Goodyear. Born in Watertown, South Dakota, he attended the University of South Dakota (B.S.). He is a Past Board Member of Navapache Regional Medical Center (Finance and Audit Committees), Vice President of Arizona Municipal Risk Retention Pool. He also served as a Past Member of Show Low School District Facilities Steering Committee and Past Municipal Liaison for Show Low Chamber of Commerce.

Larry enjoys golfing, computer games and reading. He is married to Vikki, an investment banker.

Thomas (Tom) Largo, Executive Committee



Tom is a Councilmember of the Salt River Pima-Maricopa Indian Community in Scottsdale. Tom was born in Phoenix, and currently serves as a Council Delegate for the Boys & Girls Clubs of Greater Scottsdale, a Board Member for Miracle House Foundation, a Council Delegate & Board Member of Devco an Enterprise of SRPMIC, and a Board Member of Salt River Materials Group.

Lisa Lovallo

In 2008, Lisa Lovallo was named the Vice President and System Manager for Cox Communications, Southern Arizona. At COX, Lisa is responsible for all the Southern Arizona business, public affairs and community relations functions in both Pima and Cochise Counties. In addition to her responsibilities at COX, she serves on 10 community boards including TREO, the Southern Arizona Leadership Council, the Tucson International Airport Authority, the Tucson Metropolitan Chamber of Commerce, the DM50, the Downtown Tucson Partnership, and the University of Arizona Cancer Center. Lisa is also a trustee of San Miguel High School and on the Advisory Board of the Museum of Contemporary Art.

Lisa was recently named "Woman of the Year" for 2010 by the Tucson Metro Chamber of Commerce. She has also been named "A Woman of Influence" by Inside Tucson business, a "Woman on the Move" by the YWCA and was given the "Spirit of Philanthropy" Award by the Association of Fundraising Professionals for her outstanding contributions to the Southern Arizona community.

Jamie P. Matanovich, Chair, Nominating Committee

Jamie Matanovich is a Consulting Psychologist who continues to work in many capacities; including children in lower income areas; gifted students, incarcerated young people and children with hearing disabilities. Born in Tucson, she attended Arizona State University (Ph.D. Psychology, M.A. Elem. Ed.; M.A. Psychology), and University of Arizona (B.A. Elem. Ed.).

She has served as President of the University of Arizona Alumni Association, Chairman of the University Medical Center, Chairman of the Board of Visitors, Chairman and National Officer in the Phoenix Junior League and Chair of the Nominating Committee for the Arizona Town Hall. Jamie continues to have an impact on many causes throughout the city and state.

Jamie has two grown children, Pam and Mike, and her husband's name is George. They enjoy attending sporting events. She is involved with activities at ASU and U of A.

Patrick McWhortor

Patrick McWhortor is President and CEO of the Alliance of Arizona Nonprofits. The Alliance is a statewide membership organization dedicated to serving, supporting, protecting and promoting all Arizona nonprofits. McWhortor's background in the nonprofit community includes being founder of NPower Arizona, serving as Interim Executive Director of the NPower National Network, working as Assistant Director at Data Network for Human Services, and serving on many nonprofit boards of directors. He is the current Chair of the Board of Directors of the National Council of Nonprofits. He also taught public policy and political science courses at ASU and in the Maricopa Community Colleges. McWhortor, a 2004 graduate of Valley Leadership, cut his teeth as an advocate in the late 1980's and early 1990's as a lobbyist for education and environmental causes. McWhortor earned both a B.A. in political science and M.A. in public administration from Arizona State University. A resident of Arizona for more than 30 years, he and his family live in Cave Creek.

Matthew (Matt) Meaker, Chair Development Committee - Legal Division

Matt is a Partner at Andante Law Group of Daniel E. Garrison, PLC. He graduated from the University of Arizona with a B.A.-Communication and Psychology; then went on to receive his J.D. from the James R. Rogers College of Law at University of Arizona.

He is a Member at Large of the State Bar of Arizona Construction Law Section's Executive Council; a Volunteer Attorney Coach for Xavier College Preparatory; a Regent Emeritus of Arizona State University; a member of the American Subcontractor's Association of Arizona.

Matt is a Past Member of the Appointments Committee for the State Bar of Arizona; a Past Member of the Economic Development Subcommittee of the City of Phoenix 2006 Bond Committee; and a Past Student Regent on the Arizona Board of Regents.

Frances (Francie) McLane Merryman

Francie is a Vice President and Senior Wealth Strategist in the Tucson Catalina Foothills Office of Northern Trust, NA. Francie holds a B.S. in Business Administration and a Master of Science in Finance from the University of Arizona. Both degrees were awarded with highest distinction. Francie is Series 7 and 66 licensed and is a Certified Financial Planner (CFP®) professional.

Francie was the former Chairman of the Board of the Greater Tucson Economic Council. She is currently Secretary/Treasurer of the board of Tucson Regional Economic Opportunities, Inc. (TREO), chaired the 2007 TREO Leadership Exchange to Portland, OR. In addition, Francie is a member of the National Advisory Board of the Critical Path Institute; member of the Advisory Board of Friends of Western Art and chaired the 2001 Artist of the Year Dinner and co-chaired the 2003 and 2006 dinners. Francie is also an Eller Center Associate. She is President of the Breakfast Club of Tucson and a member of Tucson's Leading Women in Business, Women Impacting Tucson and TIEMPO. She is a member of the Southern Arizona Estate Planning Council, Tucson Airport Authority and the Mountain Oyster Club. In 2006, Francie was named a Woman of Influence by Inside Tucson Business Magazine.

Dennis E. Mitchem, Vice Chair, Membership Committee

Dennis Mitchem came to the Valley from Chicago in 1958 to help open the Arthur Andersen office in Phoenix. He retired as an active Arthur Andersen partner in 1993. He graduated with distinction from the University of Nebraska in 1952 and became a Certified Public Accountant in 1953. In October 1998, Denny joined Northern Arizona University as Director of Corporate Relations located in Phoenix.

During his years in the Valley, Denny has been very active in community and professional activities. He helped found Valley Leadership, Phoenix 40, Herberger Theater, ASU College of Business Council of 100, Economic Club of Phoenix, Citizens Transportation Council, Downtown Crime Task Force, Phoenix Community Alliance, Downtown Phoenix Partnership, and YES on 400.

Denny currently serves as a board member and volunteer to several civic and humanitarian organizations. He was recently honored for outstanding community service by Goodwill of Central Arizona.

Richard Morrison, Executive Committee

Richard Morrison is an attorney with the law firm of Salmon, Lewis & Weldon, PLC. He received a B.S. from Northern Arizona University, an M.A. from San Francisco Theological Seminary, and a J.D. from the University of Houston, and a Doctor of Humane Letters from the University of Arizona.

He serves as an Advisor to the Water Resources Research Center, University of Arizona; Trustee of the Farm Foundation in Chicago; Director, Agri-Business Council of Arizona; and is Chairman of the Board of Advisors of the Morrison Institute of Public Policy, Arizona State University.

Richard is also an active priest in the Episcopal Church.

Mark S. Nexsen, Treasurer

Mark is the Mayor of Lake Havasu City. He currently holds an active license as a Certified Public Accountant in Arizona and California. He is an honors graduate of San Diego State University with a B.S. degree in accounting.

His volunteer activities include Chairman Colorado River Regional Sewer Coalition, Appointed by former Governor Napolitano to Arizona Municipal Tax Code Commission in 2008, Member of Executive Committee for the Arizona League of Cities and Towns, 2008 Public Service Award Recipient from Arizona Society of Certified Public Accountants, Board Member of Coordinating Lake Havasu Efforts Against Narcotics ("CLEAN").

Mark and his wife Eileen enjoy playing golf with friends and spending time with their three dogs. Their son Jonathan, who is also an accountant, lives in Sacramento.

Alberto Olivas

Alberto is the Director of the Maricopa Community Colleges Center for Civic Participation. Originally from Sierra Vista, he has degrees from Arizona State University (B.A. Anthropology) and Northern Arizona University (M.Ed.).

He is currently Chair of the board of directors for Kids Voting Arizona, and also serves on the boards of directors for Valley Leadership and the Mesa Association of Hispanic Citizens. He is a graduate of the inaugural class of the Flinn-Brown Arizona Civic Leadership Academy, and of the Valley Leadership, Tempe Leadership and Mesa Leadership programs. He is a past Vice President of the Arizona Hispanic Chamber of Commerce, and previously served as Director of the Governor's Office of Equal Opportunity, as Voter Outreach Director for Secretary of State Betsey Bayless, was appointed to the Arizona Commission of Indian Affairs, and participated in the U.S. delegation to Moscow for the 2008 Dartmouth Conference.

Paul R. Orme

Paul is an attorney in Mayer, Arizona, and is Of Counsel to Salmon, Lewis & Weldon, PLC. Born in Phoenix, he attended Occidental College (B.A.) and the University of Arizona Law School (J.D.).

He currently serves on the Orme School Board of Trustees and the Orme Ranch Board of Directors. He also serves on the Board of Directors of the Central Arizona Land Trust. In the past, Paul served as Vice President of Phoenix 20-30 Club and was a member of Arizona Water Protection Fund Commission, Arizona Water Banking Study Commission, and Valley Leadership (Class VII).

Toby Payne, Chair, Technology Committee

Toby is the Founder & CEO of Stage Sound/Audio Visual of America; President, Technically Integrated Inc. Born in Phoenix, he attended Phoenix College.

Toby is currently the Vice President of Carefree Kiwanis and heads the Cave Creek Christmas Pageant now in its 49th year. He also serves on the Arizona Musicfest Board, Desert Foothills Theater Board, and the Sonoran Desert Center for the Arts Board.

Toby and his wife, Deborah, have two sons, Jared and Dustin. He enjoys boating and travel, particularly to Oak Creek Canyon.

Hank Peck, Executive Committee

Hank Peck, CFP®, is a Partner at TCI Wealth Advisors, Inc. TCI is a fee-only registered investment advisory firm with offices in Tucson, Scottsdale, Flagstaff, Reno, Denver, and Santa Fe. TCI provides full wealth management, investment, and financial planning services.

Hank currently serves on the boards of directors for the Northern Arizona University Foundation (chair-elect), Arizona Town Hall (executive committee), Arizona Business Coalition on Health, and the St. Philip's in the Hills Preservation & Endowment Foundation. Hank also serves on the DM50 and chairs the Public Policy Committee. He is a member of the Southern Arizona Estate Planning Council, Greater Tucson Social Venture Partners, and Los Charros de Desierto.

Hank is a founding (and very long-term retired) member of the Tucson Magpies Rugby Club. His hobbies include fly fishing and golf.

J. Nicholas (Nick) Pierson

Nick is a Financial Advisor/Retirement Plan Specialist in Tucson. He graduated from the University of Arizona with a BS in AgEcon.

His memberships include the Association for Latino Professionals in Finance and Accounting, ALPFA (Board Member at Large for Tucson Chapter and Orange County Chapter); National Association of Insurance and Financial Advisors, NAIFA; Latino Business Chamber of Greater Los Angeles Member; Member University of Arizona Alumni Association; Tucson Hispanic Chamber of Commerce Member – Chair "El Sabor de Tucson" Committee – Scholarship Fund Raiser.

He served in the United State Army Reserves from 1970 to 1978 as a medical corpsman and operations sergeant.

Nick is married to his wife, Marolyn, and has three children and four grandchildren.

Cliff Potts

Cliff Potts is the owner of Prudential Arizona Realty, a full service real estate company in Payson and Pine, and serves as its Designated Broker.

Cliff has served as the President of Central Arizona Board of Realtors and received its Lifetime Achievement Award for his activities on behalf of the industry. Cliff has served on the Town Council of the Town of Payson, and was Mayor from 1994 to 1996. He has served as the President of the Payson Economic Development Corporation as well as many other support positions within the Northern Gila County area.

In addition to the real estate business, currently Cliff serves as an instructor of salesperson licensing course for Gila County Community College and serves on the Gila & Pinal County "Workforce Investment Board." Cliff is also active with the Boy Scouts of America, Payson Rotary Club and serves on the Town of Payson Housing Advisory Commission.

Cliff is married to his sweetheart, forever, Jean, has two children and three grandchildren.

Dick Powell

Dick Powell is married to Nancy and has four children. Residing in Casa Grande, he operates a 60-year-old family business, Powell Feed & Supply Inc. He graduated from Casa Grande Union High School, and holds a double degree in Marketing and Management from Northern Arizona University.

Dick's civic involvement includes: Membership in the Casa Grande Chamber of Commerce and selected for the Chamber's Hall of Fame, Past President and life member of the West Pinal Mounted Sheriff Posse, Chairman of Cowboy Days, Town Hall delegate to Arizona, Pinal County, and Casa Grande Town Halls, 4-H leader for ten years at the local and county levels, founding and former executive committee member of the Greater Casa Grande Economic Development Foundation, serving fourth term as a Casa Grande City Councilman, served three times as Mayor Pro Tempore, Steering Committee for the 2000 and 2010 Casa Grande General Plan, served eight years on the Casa Grande Union High School Board (four as president), and First Presbyterian Church member and Elder.

Kathryn (Casey) Prochaska

Casey is the Chair of the Yuma County Board of Supervisors (Dist. 3). Born in Yuma, Casey attended the University of Arizona (B.S. Pharmacy).

She is the Chair of the Yuma Metropolitan Planning Organization and a Member of Rotary, Arizona Military Preservation Organization, Arizona Association of Counties, and County Supervisors Association.

Warren L. Prostrollo, Chair, Research Committee

Warren is the Principal of Next Step Management; and Retired Executive Vice President and Senior Credit Officer, Southwest Region, Bank of America in Paradise Valley. Born in Kansas City, Missouri, Warren attended the University of South Dakota (B.S.).

His civic and cultural affiliations include Founding Principal of Next Step Management, and Chairman of the University of South Dakota Foundation. He is Co-Chair of the Legacy Society, Brophy College Preparatory, and a Member of Arizona State University West Campus Provost Adv. Committee. He also is a volunteer at Scottsdale Healthcare.

He is a Past Board Member of Arizona Multibank, Compas, United Way, California State University Foundation and Modesto Symphony Association.

Letty Ramirez

Letty is the Vice President of Advocacy, Government and Community Relations for Carondelet Health Network in Tucson, an Ascension affiliate. She received an MBA from Boston College and a Master's degree in Communication Disorders from Western Michigan University. She holds certificates in International Business from the University of San Diego and Entrepreneurship from Southern Methodist University in Dallas, Texas.

She is a board member of the Arizona Chapter, American College of Healthcare Executives, and Chair, Health Care Committee for the Tucson Metropolitan Chamber of Commerce. Letty is a member of numerous professional organizations, including the Government Relations Council and Federal Relations Committee, Arizona Hospital and Healthcare Association; American Hospital Association; National Association of Latino Elected Officials; and the Society of Healthcare Planning and Market Development.

Librado (J. R.) Ramirez

Born in Pearce, J.R. is the Executive Director of the Southeastern Arizona Community Action Program in Safford.

He served in the U.S. Air Force (Retired), and attended Cochise Community College and the University of Maryland (Social Science).

His civic and community affiliations include: Past Board President of Southeastern Arizona Behaviorial Health System, Trust Commissioner for ADHS, Director of the Arizona Community Action Association, and Director of Nineteen Tribal Nations Workforce Investment Board.

Everett Rhodes

Everett is a graduate of Class III and Director of Project CENTRL (Center for Rural Leadership), which operates in partnership with the University of Arizona Cooperative Extension. He is a life-long educator with a focus on building the leadership potential of people in rural Arizona. Born in Casa Grande, he is a graduate of the University of Arizona (B. S. and M.S.). His educational career started as a FFA Advisor at Casa Grande Union High School in 1972, continued as a Pinal County 4-H Youth Development Agent in 1986 and Project CENTRL Director in 1997.

Currently, Everett is a member of the Arizona Rural Development Council, Arizona Farm Bureau, and the National Association of County Agricultural Agents. In the past, he served on the Casa Grande Union High School Board and as President of the Arizona 4-H Agent's and Arizona Agriculture Teacher's Associations.

Everett and his wife Linda have been married 39 years and have three children and three grand children. In his spare time, he enjoys gardening, racquetball, and fishing.

Scott Rhodes, Board Chair Elect

J. Scott Rhodes is Managing Attorney of Jennings, Strouss & Salmon, P.L.C. A substantial part of his practice focuses on representing lawyers in lawyer discipline proceedings and counseling lawyers and law firms on issues related to legal ethics and the law of lawyering. The Best Lawyers in America® named Scott as the 2011 Administrative Lawyer of the Year in Phoenix. He also has been selected for inclusion in 2011-2012 Southwest Super Lawyers in the categories of Professional Liability, Defense, Government/Cities Municipalities, and Utilities Law. In 2011, the Arizona Supreme Court appointed Scott to serve on its Attorney Regulation Advisory Committee, which makes recommendations regarding attorney examination, admissions, reinstatement, disability and the lawyer discipline process. Scott was the co-recipient of the State Bar of Arizona's 2010 Member of the Year Award. He was Chair of the Ethics Committee of the State Bar of Arizona from 2009-2011, and was a member of the Arizona Supreme Court Attorney Discipline Task Force from 2009-2010.

Zoe Richmond

Zoe Richmond is the director of public affairs for Union Pacific, covering Arizona and New Mexico. Richmond first entered the world of railroading through Operation Lifesaver, a non-profit organization focused on rail safety, where she was Executive Director.

She started her corporate career as a spokeswoman for State Farm, where she was the company's first official Spanish-language spokesperson for the company. She was part of the team that led the company to break into the Hispanic market.
She has also worked as a journalist covering city hall.

Richmond holds a bachelors degree in Journalism from Northern Arizona University and a Masters degree in English from Illinois State University.

She resides in Gilbert, with her husband, Nick, and dog, Sagan.

Casey Rooney

Casey Rooney is the Economic Development Director for the City of Cottonwood and the President and CEO of the Cottonwood Economic Development Council. Casey is the Chair of the Northern Arizona Council of Governments Economic Development Council, Board member of the Verde Valley Regional Economic Organization, Sustainable Economic Development Initiative, Verde Valley Wine Consortium, Arizona Wine Growers Association, Arizona Town Hall, and United Way of Yavapai County.He also enjoys hiking, birding, and gardening, and hanging out with his beautiful wife Jodi and dog (Duke).

Casey has a Bachelor of Science Degree from Bowling Green State University in Ohio, a Master of Business Administration from the University of La Verne in California and a graduate of the Economic Development Institute at the University of Oklahoma. His present educational endeavor involves participation in the State-wide Project CENTRL leadership program.

Mary Rowley

Mary is the president and owner of Strongpoint, a public relations and market research firm with offices in Tucson and San Francisco. She first came to Arizona in 1979, when she worked for *The Arizona Republic* following a career as a newspaper reporter in Ohio. In the past, she has served as press secretary to the Delaware State Superintendent, and her experience also includes economic development, healthcare, real estate, election campaigns, utilities and non-profits.

Holding a bachelor's degree in communications and an MBA, Mary has been an adjunct instructor in undergraduate marketing at the University of Phoenix and currently serves as immediate past chair of the Pima Community College Foundation, president of the Breakfast Club of Tucson and a member of the Public Relations Society of America. She also has been president of the American Advertising Federation – Tucson, co-chair of the University of Arizona Brain Trust, a member of the Tucson Unified School District Blue Ribbon Committee, and marketing chair of the Arizona Theatre Company board of directors. She recently joined the board of Junior Achievement of Southern Arizona.

Ron Shoopman

Ron Shoopman assumed the role of president of the Southern Arizona Leadership Council (SALC) in December, 2004. Under his leadership the group has nearly doubled in size and has compiled an impressive list of accomplishments. The nearly 100 CEO's of SALC are actively involved in creating a vibrant future for the Tucson region and state of Arizona by engaging the critical issues of education, infrastructure, healthcare, governance as well as science and technology.

Ron's extensive military and business experience has served him well in his role at SALC. A former wing commander of the 162nd Fighter Wing, he commanded the International F-16 Training Wing for the United States Air Force. Ron's civilian experience includes 7 years with Gates Learjet Corporation as sales manager for the central US, a pilot for Continental Airlines and an instructor pilot and manager for Flight Safety International. He received professional military education at the Air War College and the Air Command and Staff College, and received his BS from Arizona State University in Aeronautical Technology.

Scott Somers

Vice Mayor Somers represents Mesa's District 6 and has been serving as a Mesa councilmember since June 2006. As an employee of the Phoenix Fire Department, Somers has participated on the Arizona Task Force One for the FEMA Urban Search and Rescue team. Scott also serves as a faculty associate for Arizona State University and is a consultant for the Continuity of Government/Operations Planning.

Scott's community involvement includes serving as Chair of the Council Audit and Finance Committee, as well as serving on the committees of public safety and general & economic development. He is also a board member of the East Valley Partnership, Mesa United Way, and a representative on the Mesa Chamber of Commerce. His membership includes the American Society for Public Administration, International Research Committee on Disasters and received the National Defense Service Medal from the US Air Force in 1991.

Scott received his Ph.D. in Public Administration from Arizona State University and received his M.S. in Technology from ASU Polytechnic.

John Stebbins

John is the Controller for Freeport-McMoRan Copper & Gold's Morenci operations. He and his family relocated from New Mexico to Arizona four years ago. John attended New Mexico State University where he received a Bachelor of Accountancy degree. He is a licensed Certified Public Accountant in New Mexico and is a member of the American Institute of Certified Public Accountants.

John's community and professional affiliations have included Leadership Roswell, Toastmasters International, Pecos Valley Rotary Club Board, Roswell Girls' Club Board, Esperanza House Board, the United Way of Chaves County Board, New Mexico Oil and Gas Association, and the Independent Petroleum Association of America.

John and his wife, Fran, have two daughters.

Bob Strain

Bob is the former Mayor of Sierra Vista and a Retired Colonel in the U.S. Air Force.

He received his B.S. in Economics from Southwestern State University, OK, his M.S.B.A. from The George Washington University, Montgomery, AL, and attended the U.S. Air Force Air War College in Maxwell AFB, AL.

Bob's past community activities include: Arbitrator, Mediator, Cochise County Superior Court; Associate Faculty, Economics, Cochise College; Advisory Board, Center for Economic Research; Sierra Vista Economic Development Foundation, Board Member and President; Upper San Pedro Partnership, Chairman, Partnership Advisory Commission, 1999–2010; Elected to Sierra Vista City Council in 1998, 2002 and Mayor in 2006.

His community memberships include: Sierra Vista Rotary Club (Past President); Greater Sierra Vista Chamber of Commerce; U.S. Air Force Association; Military Officers Association of America; Fort Huachuca 50 and Association of the U.S. Army; Sierra Vista Citizens Police Academy Association.

Ken Strobeck

Ken Strobeck is the Executive Director of the League of Arizona Cities and Towns, which is a lobbying and service organization for the 91 incorporated cities and towns in Arizona. Prior to coming to Phoenix from Oregon in 2005, he served as the Executive Director of the League of Oregon Cities; Vice President, Public Affairs, for Conkling Fiskum & McCormick; a State Representative in the Oregon Legislature for 6 years; AVP, Corporate Communications, Blue Cross Blue Shield of Oregon; Communications Director for Emanuel Hospital; Senior Producer, News Director, and Reporter for KATU-TV, KGW-TV Portland, KOLD-TV Tucson, and KEZI-TV Eugene. He has a BA in Journalism and Public Affairs from the University of Oregon.

John Sullivan

John is the Associate General Manager and Chief Resources Executive at Salt River Project. He received his baccalaureate degree in electrical engineering from the University of Arizona, is a past President of the Water for the West Foundation and the National Water Resources Association and is currently serving on the boards of both organizations.

John is also on the Board of Directors of the Colorado River Water Users' Association. He is a former board member of the Arizona Electric Power Cooperative, Colorado River Energy Distributors, Tempe United Way and the Desert Botanical Garden.

He is a native Arizonan and a resident of Chandler. John and his wife, Pat, have three children: Melissa, Brian and Rebekah.

Sheryl A. Sweeney, Vice Chair, Development Committee - Legal Division

Sheryl is an attorney and member of the Executive Committee of the Phoenix law firm of Ryley, Carlock & Applewhite. Born in Kansas, she attended the University of Kansas (J.D.) and Kansas State University (B.A.).

She is a member of the American Public Power Association, the American Society for Testing Materials, the Arizona Farm Bureau, the Arizona Women Lawyers Association, the Colorado River Water Users Association, the Maricopa County Bar Assn. (Environmental and Natural Resource Law Section), the State Bar of Arizona (Environmental and Natural Resource Law Section), Valley Forward, and the Athena Powerlink Advisory Group.

W. Vincent Thelander III

Vince is a Vice President and Senior Client Manager with Bank of America Merrill Lynch Global Commercial Banking. He is an Arizona native, and earned a B.S. in Business Management from the W.P. Carey School of Business at Arizona State University, receiving the 'Academic Achievement Award' from the Barrett Honors College.

Responsibilities in Vince's current role include managing commercial banking, finance, and complex treasury solutions for small to mid-size emerging Arizona companies. Vince is also on the Leadership Council and Campus Chair for the Military Support & Assistance Group, an employee volunteer organization that supports active & former duty military service members and their families through a variety of community activities. He has been a guest presenter at a community college entrepreneurship class, and regularly speaks at Economic Development forums helping companies develop or expand export opportunities.

Vince is married with two young children, and enjoys SCUBA diving, fishing, and studying Shotokan Karate with his son.

Rebecca Timmer

Rebecca has more than 18 years of experience in account management, business development, marketing, public involvement and business analysis. She is responsible for Corporate Relations with Dibble Engineering, focusing on government affairs and new markets in Arizona. Rebecca serves on the Board of Directors of the Arizona Chapter of the American Public Works Association (APWA). She is a Certified Ambassador with the Greater Phoenix Economic Council (GPEC) and serves on GPEC's Steering Committee. Rebecca volunteers on the Policy Committee of the Alliance for Construction Excellence's (ACE) Public-Private Partnership Task Force and received the ACE Collaboration Achievement Award (2009). She also serves as Co-Chair on the Government Affairs Committees for both the Arizona Association of Economic Development and Pinal Partnership. As a member of Arizona Town Hall since 2009, she participated in the 95th Arizona Town Hall: Riding the Fiscal Roller Coaster – Government Revenue in Arizona.

Lester J. (Chip) U'Ren, Chair, Human Resources Committee

Chip is the Retired Associate General Manager for Operations, Information & Human Resources at Salt River Project. Born in River Falls, Wisconsin, he attended the University of Arizona (B.S.).

In addition to being a past Board Chair for the Arizona Town Hall, Chip is the Chairman for the Western Energy Institute, and a Board Member at the University of Arizona School of Business National Board of Advisors, ASU College of Fine Arts, Maricopa Partnership for Art and Culture Board, and Men's Anti-Violence Network Board of Directors. He also is a Member of the Men's Art Council and Northern Arizona University President's Advisory Committee.

Chip and his wife Nancy have two children, Jennifer and Steve, and three grandsons. He enjoys metal art, long distance running, hiking, scuba instructing, and skiing.

Danielle Viola

Danielle was born and raised in Arizona. After graduating from Arizona State University with a Bachelor of Arts in Political Science, Danielle worked as a legislative analyst in the Arizona Governor's Office for two years before returning to ASU to attend law school. After law school, Danielle practiced law at Snell & Wilmer for twelve years. As a partner at the firm, Danielle's practice was focused on helping clients solve their business disputes through mediation, arbitration and litigation. In March 2011, Danielle was appointed by Governor Brewer to the Maricopa County Superior Court where her first assignment is a Family Court calendar. One of Danielle's passions is serving the community. She is the past President of the Phoenix Public Library Foundation and currently serves as a Board Member and the immediate Past-President of the Sandra Day O'Connor College of Law Alumni Association.

Danielle is married to Joe Viola, a local real estate attorney. The Violas enjoy living in downtown Phoenix with their dog, Lola. In her free time, Danielle enjoys practicing and studying yoga, hiking, and travel.

Richard S. Walden

Dick is the President and CEO of Farmers Investment Co., a family-owned, pecan growing and processing company headquartered in Sahuarita. Born in Oxnard, California, he attended Stanford Business School Executive Program, and Pomona College, Claremont, CA (B.A. Economics).

Dick was appointed to the Arizona Power Authority as a Commissioner in 1984 and appointed vice-president in January 2008. He is a member of the Board of the International Tree Nut Council and in that capacity serves as the chairman of the Committee for Nutrition and Education associated with the Nutrition and Education Foundation. He is also a former member of the Advisory Council on Small Business and Agriculture for the Federal Reserve Bank of San Francisco and a member of the Board of the National Pecan Shellers Association.

Ron Walker, Board Chair

Ron has served as Mohave County Manager since 2001. Born in Greenville, Texas, he attended National University (MBA), the University of Southern California (MS) and Texas A&M (BS). He is a retired Captain in the U.S. Navy where he spent 26 years and retired in 1994.

Ron and his wife Sally have two children, Amanda and Danny. Ron enjoys traveling, boating, physical fitness and fishing the Sea of Cortez in his leisure time.

Janice Washington

Janice is the State Director for Arizona Small Business Development Network. She has an MBA in Accounting/Tax from Arizona State University and a BS in Accounting from Jackson State University.

Janice serves on the Board of Directors of the Arizona Small Business Association, is a member of the Arizona State Board of Tax Appeals (Past Chair), Delta Sigma Theta Sorority, Inc., and Jackson State University Alumni Association.

She is a Past President of the Arizona State Board of Accountancy, was on the Board of Directors, Arizona Society of Certified Public Accountants, a Past Chairperson for the City of Phoenix Expenditure Limit Task Force and Spending Limit Task Force, Arizona State Board of Accountancy Law Review Committee, and has served as an Advisory Board Member for the Private Industry Council. She is also a Past Member of the Governor's Council on Workforce Policy and the Phoenix Urban League.

Devan Wastchak

Devan is the Managing Partner of VIVO Development Partners, LLC, in Phoenix. He has been involved in many aspects of the real estate development and construction industries. Over the past 18 years he has focused on the development of more than 4,000 multi-family units as a partner in VIVO Development, and with one of the leading multi-family developers in the Southwest.

Having graduated with honors from the Construction Engineering program at Arizona State University, Devan has also taught a senior level real estate development course as an Associate Professor of Real Estate Development and served as a guest lecturer in the Master of Real Estate Development program at ASU.

Cathy Weiss, Secretary

As Executive Director of the Del E. Webb Center for the Performing Arts in Wickenburg, Cathy leads a non-profit organization dedicated to presenting world class performing arts in a 600 seat, state-of-the-art theatre while providing free arts education experiences in classrooms, after school and through extended residency programs for the 2,100 children in this rural area of Arizona. In addition, the Webb Center produces an arts summer camp for 120 children each June. The Webb Center provides a life-long learning series for adults each season.

Cathy is also the curator for the Flying E Guest Ranch Project that provides a tranquil artists live/work space in Wickenburg for performing artistic companies from all over the world to create new work to add to their repertoire. Prior to joining the Webb Center team, Cathy enjoyed a 27-year career in the luxury hotel business.

Cathy is married to Rui Pereira; the General Manager of Rancho de los Caballeros who serves the community as a member of the Wickenburg Town Council.

David Welsh

David serves as the Executive Vice President of Tucson Regional Economic Opportunities (TREO).

David sits on the Arizona Association for Economic Development (AAED) Board of Directors as well as its Government Affairs subcommittee. In addition, David serves on the Habitat for Humanity Tucson Board of Directors, and as a member of Wilson Elementary School Parent – Teacher Organization.

David's wife, Erin Collier, is a local fundraising consultant. He has two sons, Reed (9) and Donny (7). David holds a Bachelors of Science in Business Administration from the University of Colorado and a Masters of Science Public Administration from the University of Oregon.

Kimulet (Kim) Winzer, Executive Committee

Kim is the West Region Compliance Officer for UnitedHealthcare Community and State and the Compliance Officer for UnitedHealthcare Community Plan. Born in Phoenix, she attended Southern University (J.D.) and Arizona State University (B.S.)

She is a member of Soroptimist International of Phoenix and a recent graduate of the Flinn-Brown Civic Leadership Academy. Kim is a former Board member of the Friends of the Phoenix Public Library, Valley Forward, and Arizona Coalition on Adolescent Pregnancy and Parenting Board (Former Chairperson of the Executive Committee); and a former member of the YMCA Achiever's Committee Steering Committee (Former Chair).

She is a past officer of Maricopa County Young Democrats and Wesley United Methodist Church's Day Care Board of Directors. She is a past member of the Hayzel B. Daniels Bar Association, Arizona State Youth Advisory Council for Clinton/Gore, and Who's Who of International Professionals.

Larry Woods

Larry has lived in the Valley since 1998, after completing a career as a Computer Scientist for Deere and Company (John Deere) in Moline, Illinois. Shortly after arriving in Scottsdale Larry begin his long relationship with various non-profit organizations, beginning with Make A Difference. Since that early introduction to volunteering Larry served on the Board of Directors of the Volunteer Center of Maricopa County and a member of the Governor's Advisory Council on Aging. Larry is presently a Board member of the Dysart Community Center, Benevilla, Arizona AARP Executive Council, and the West Valley Art Council. Larry is also a member of the Arizona Citizens Transportation Oversight Committee (CTOC) and presently serves on the Research Committee for the Arizona Town Hall. Oh, yes. And in his spare time he runs a Web development business.

Larry and his wife Diane presently live in Sun City West where he is Past President of PORA and is presently the President of Friends of the R.H. Johnson Library.

Town Hall Operations

Volunteer Madeline Loughlin and Arizona Town Hall President Tara Jackson at the Fall Town Hall on Energy held at the Grand Canyon. .

The Arizona Town Hall Board

The Town Hall has a large Board of approximately 60 people from around the state. The Board meets twice a year, once in conjunction with the Annual Meeting and again at the end of the year.

The Executive Committee

The Executive Committee is essentially the operating arm of the Board. The Executive Committee, comprised of the officers and at large members, meets four to six times a year to consider operational issues and to make recommendations to the full Board. Committee Chairs generally attend these meetings as well..

The Town Hall Staff

The Town Hall has a small paid staff and most work part-time. The vast work of the Town Hall is accomplished through the efforts of this paid staff combined with professional volunteers and strategic partnerships.

Tara Jackson, President

Laura Parsons, Executive Asst. - Office Operations

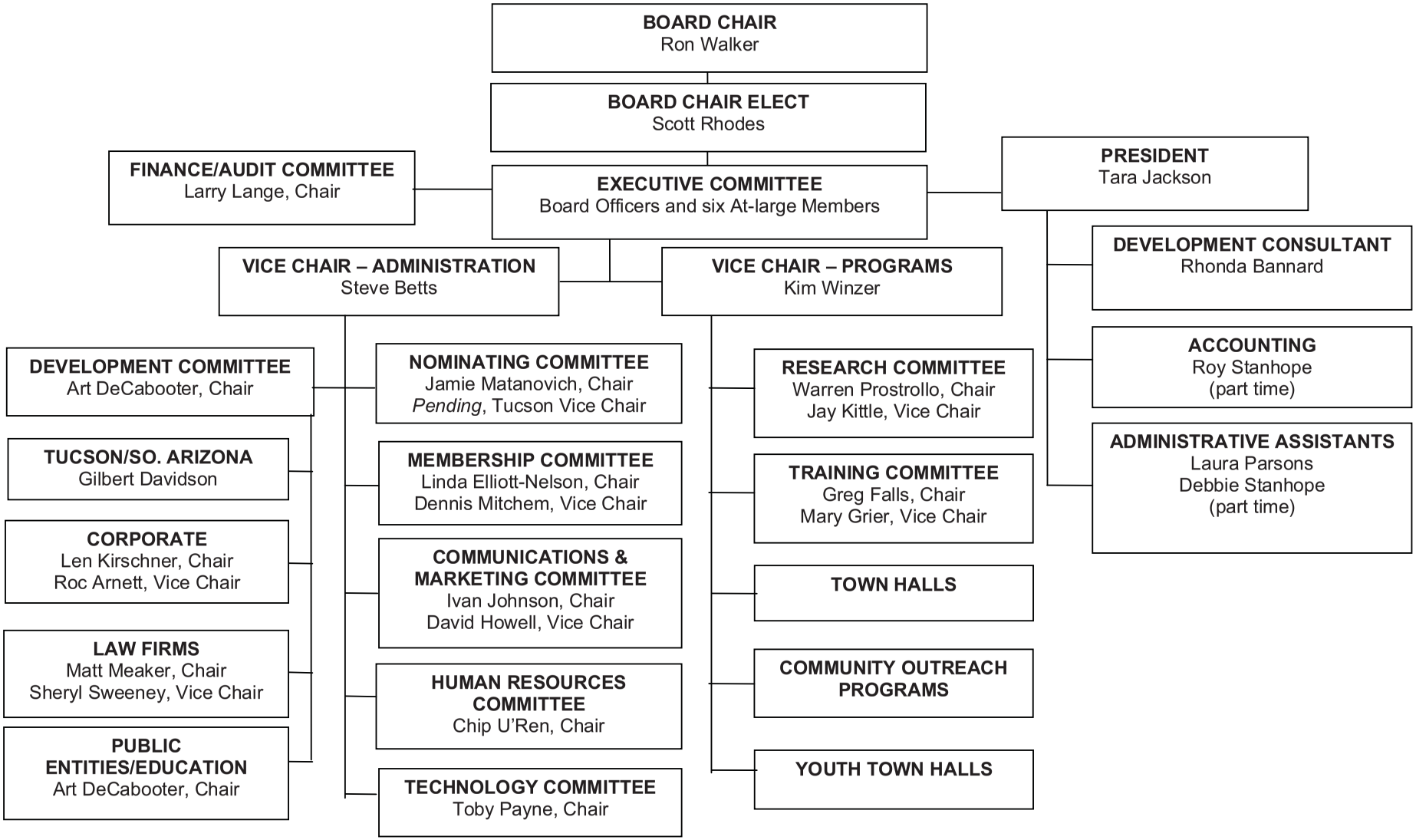
Debbie Stanhope, Website & Publications

Roy Stanhope, Accounting

Kathy Haake, Volunteer

Madeline Loughlin, Volunteer

ARIZONA TOWN HALL ORGANIZATIONAL CHART 2012 – 2013



Committees

Finance/Audit Committee: Establishes scope of audit, reviews and audits financial records for the organization or secures an outside consultant or agency to audit and examine organization's financial and operational records. Develops and prepares the annual budget necessary to accomplish the goals of the business plan. One or two meetings are held per year.

Communications/Marketing Committee: Manages communications and marketing strategies that enhance the visibility and image of Arizona Town Hall, both to the public and to the membership. Devises means for disseminating Arizona Town Hall information to more effectively increase education, implementation and more active participation regarding Town Hall recommendations. Meetings of approximately two hours each are scheduled as needed.

Development Committee: Reviews organizational needs, establishes development processes (including both member and nonmember prospects), identifies available resources and seeks out new resources. Makes recommendations and pursues corporate and foundation/grant sponsorships and develops additional fund-raising opportunities, including, but not limited to, endowments, planned giving and special events. The committee is divided into a northern Arizona section which includes Phoenix, and a southern Arizona section which includes Tucson. The northern Arizona section is further divided into three subcommittees: (1) Corporate; (2) Governmental/Educational; and (3) Legal & Public Affairs. Committees meet as needed.

> *I do read and reflect upon the reports, and I share them with colleagues and with organizations in which I am involved. I find the data most intriguing. Because I am by training a social-behavioral scientist, I like basing decisions on data, not speculation. The Town Hall deliberations lead to more valid recommendations and conclusions among thoughtful people. – Town Hall member*

Human Resources Committee: Helps to guide decisions on staffing levels, job descriptions, office policies and compensation programs. One or two meetings per year are held.

Membership Committee: Works with Development and Communications Committees to encourage involvement and interaction with members.

Nominating Committee: Examines board and officer (including executive committee) structure and prepares a slate for election of new board and executive committee members as well as officers. Generally meets once in the spring.

Research Committee: Works with representatives from the state's universities to develop the scope and initial outline for each Town Hall background report. Reviews final detailed outline and critiques final draft of each report. Identifies and involves directly impacted sectors of the community on the subjects for each Town Hall. Studies, devises and recommends mechanisms to improve objectivity and relevancy of Town Hall research reports. Four meetings approximately four hours each are held.

Training Committee: Conducts training session prior to each Town Hall to prepare panel chairs, panel recorders and report chairs and to perfect discussion questions used for each Town Hall. Conducts a "Master Training Program" biennially to recruit, train and establish a list of potential Town Hall recorders for the following Town Hall sessions. Two half-day Saturday meetings each year are held; one or two additional three-hour meetings are included every other year.

> *"When I trained to be a recorder for Arizona Town Hall, I could not have guessed how valuable the experience would be. I use the skills that I've developed as a recorder daily. When I worked at the Arizona legislature and the Attorney General's Office, the ability to identify consensus among divergent views was critical. As a superior court judge assigned to family court, I help parties identify their areas of consensus every time I take the bench. Once they understand that there are areas of agreement, they are better prepared to resolve the remaining issues. That understanding is critical for parents who are separating, but who must continue to work together to raise their children." –Hon. David Gass*

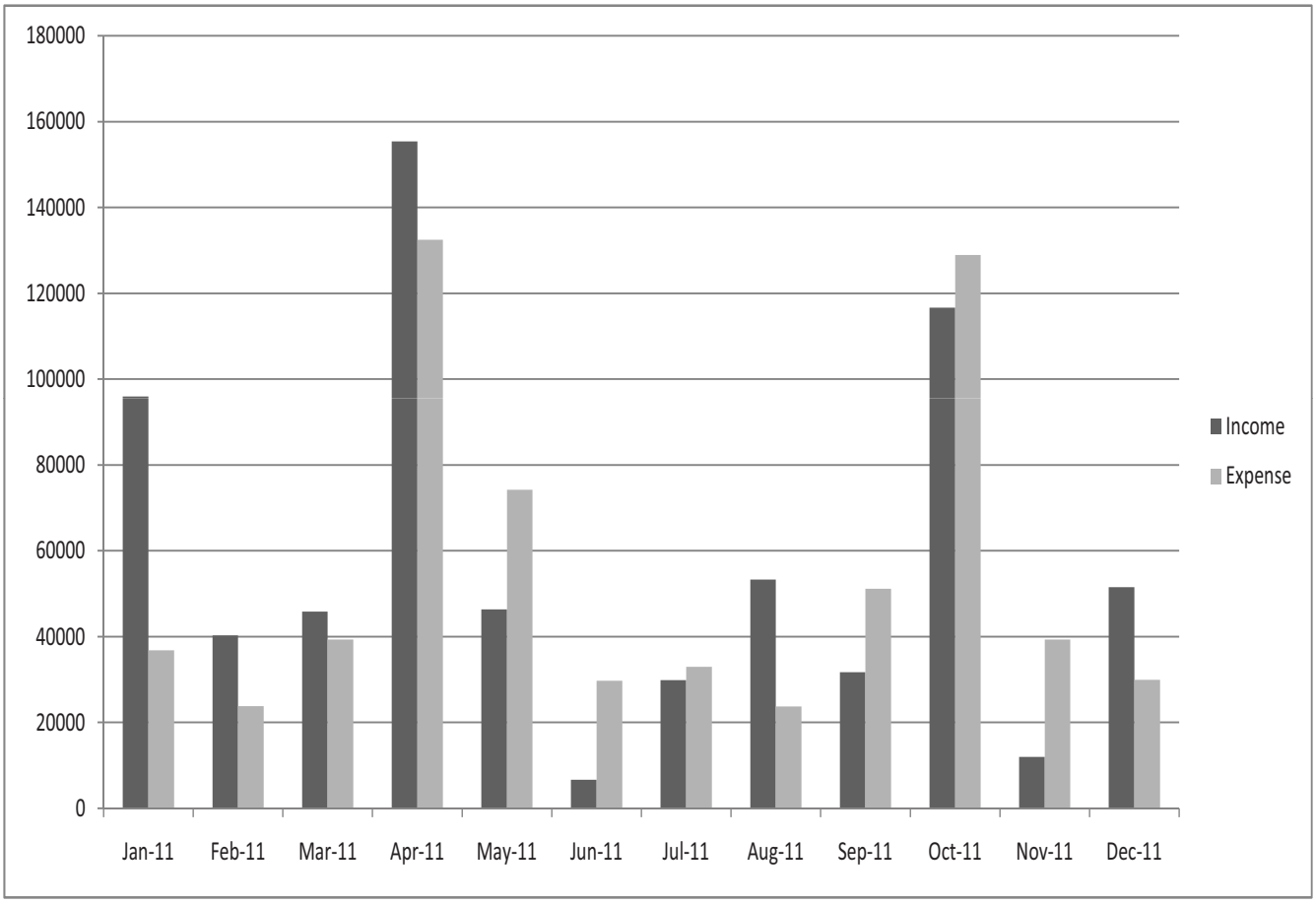
Finances

Projections based on unaudited financials

2011 Income	
Donated Goods & Services Revenue	30.91%
Grants, Sponsors, Partnerships	29.39%
Registrations & Program Fees	15.43%
Annual Membership Dues	11.02%
Annual Fall Luncheon	6.91%
Individual Contributions	4.34%
Community Outreach Programs	0.86%
Meetings, Committees & Events	0.78%
Consulting Services	0.24%
Interest from Savings Account	0.13%
Total Income	**$629,858.76**

2011 Expenses	
Contract/Professional Services	40.01%
Salaries and Related Expenses	30.86%
Program (Town Hall) Expenses	11.24%
Facility, Lease & Equipment	7.14%
Non-Personnel Related Expenses	5.74%
Fall Luncheon Expenditures	2.14%
Travel/Meeting Program Expense	1.23%
Other Expenses	1.15%
Medical Insurance	0.49%
Total Expenses	**$632,764.75**

Income and Expense by Month
January through December 2011



Accrual Basis

ARIZONA TOWN HALL
Balance Sheet
As of December 31, 2011

ASSETS	
Current Assets	
Checking/Savings	
1000.0 · Unrestricted Accounts	72,801.96
1050 · AZ COMM. FOUNDATION-AGNOS	155,585.50
Total Checking/Savings	228,387.46
Accounts Receivable	
1100.0 · Accounts Receivable	1,738.73
Total Accounts Receivable	1,738.73
Other Current Assets	
1290 · Undeposited Funds	4,450.00
1300.0 · Prepaid Expenses	1,299.00
1320 · Deposit - Office Lease	3,151.88
1350 · Supplies Inventory	587.72
Total Other Current Assets	9,488.60
Total Current Assets	239,614.79
Fixed Assets	
1600.0 · Fixed Assets - Operating	30,468.82
1700.0 · Accumulated Depreciation	(22,667.35)
Total Fixed Assets	7,801.47
Other Assets	
1500.0 · Investments	2,937.00
Total Other Assets	2,937.00
TOTAL ASSETS	250,353.26
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000.0 · Payables	(3,954.78)
2060 · Rent Concession Allowance	5,351.65
Total Accounts Payable	1,396.87
Other Current Liabilities	
2100.0 · Accrued Liabilities	9,381.32
2300.0 · Deferred or Unearned Revenue	47,641.53
Total Other Current Liabilities	57,022.85
Total Current Liabilities	58,419.72
Total Liabilities	58,419.72
Equity	
2990 · Retained Earnings	189,083.13
2999 · Opening Bal Equity	18,416.36
Net Income	(15,565.95)
Total Equity	191,933.54
TOTAL LIABILITIES & EQUITY	250,353.26

Frequently Asked Questions Regarding Fund Development

What are my fundraising responsibilities as an Arizona Town Hall Board member?

Personal contacts bring in the majority of our funds, so talking about Arizona Town Hall and asking others for their support is essential. We ask each Board member to make a personal financial contribution in addition to their $100 annual dues so that we're able to tell grantmakers that we have 100 percent Board participation in annual fundraising. This is an important metric when securing grants. The contribution amount varies among Board members according to personal circumstances, from very small to substantial. As a guide, we ask that each Board member personally contribute or help us secure contributions that total $1,000 per year.

How can I be of greatest help to ensure that Arizona Town Hall is financially viable?

The short and long term sustainability of the organization is critical to carry on the legacy of the last 50 years. You can be a great champion for us by leveraging your relationships, talking about the Arizona Town Hall process and accomplishments with your contacts in the community, and ask for their participation through membership and partnerships of Town Halls. Partnership benefits are expanding and included at the end of this section.

What should I say about Arizona Town Hall?

Talk about your personal experiences with the Town Hall process.

Arizona Town Hall brings together a broad cross-section of people with varied points of view from throughout the state. In this way, our process and activities impact the life of every person in Arizona.

Arizona Town Hall allows individuals to set aside the adversarial stances often assumed on controversial topics, and instead to focus on finding areas of agreement and seeking workable solutions. Participants have an opportunity to experience first-hand the advantages of building relationships and engaging in civil discussions based on an in-depth understanding of key issues. The skills developed in this process have wide applications in professional and community settings. The outcome is enhanced individual expertise and a heightened level of understanding and sense of responsibility among our state's citizens.

In addition, the reports created by Arizona Town Hall serve as a unique and valuable resource for Arizona's leaders and citizens.

What should I say about the impact of Arizona Town Hall?

Since 1962, Town Hall recommendations have contributed to establishing the Arizona Department of Revenue, the Ground Water Management Act that created the Department of Water Resources, the Department of Environmental Quality, and the Science Foundation of Arizona. Further, Town Hall recommendations led to the creation of the merit selection system for Maricopa and Pima county judges, and the passage of the Juvenile Crime Omnibus Bill, described by many as the most significant reform of juvenile crime measures in the state's history. These are just a few examples—please add your own as you talk with others and be confident that many past participants have used their experience as a catalyst to effect change in their work, community and state.

Does Arizona Town Hall accept credit cards?

Yes. Go to aztownhall.org and click in the left column on "Renew Membership" or "Make a Donation." Please be aware that we are charged a fee for this service based on the contribution amount, so we prefer a check for larger amounts.

What are the basic benefits of Arizona Town Hall membership?

Access to a broad network of concerned and involved Arizonans. Members gain valuable leadership skills through the use of the Town Hall process. All membership levels, individual and corporate, include access to Arizona Town Hall reports, newsletters, and invitations to the Annual Meeting and other Arizona Town Hall events.

What are the Individual Membership categories?

Individual membership dues are $100 per year, of which $90 is tax-deductible because Arizona Town Hall is a 501(c)(3) nonprofit organization. Any Arizona citizen is allowed to join the Town Hall for $100; students for $10. Many members make a contribution in addition to dues and are recognized in the Annual Report as follows:

Town Hall Citizen	up to $199.99
Civic Messenger	$200.00 - $499.99
Consensus Champion	$500.00 - $999.99
Communicator	$1,000 and higher
Life Member	$2,500 or $1,000 annually for three years

What are the Corporate Partnership categories and benefits?

Corporate partnership include a varying number of individual memberships as indicated in the chart below.

Benefits	Premier Partner $50,000 +	Presenting Partner $25,000 - $49,999	Contributing Partner $15,000 - $24,999	Collaborating Partner $10,000 - $14,999	Supporting Partner $5,000 - $9,999	Civic Partner $2,500 - $4,999	Consensus Partner $1,500 - $2,499	Associate Partner $1,000 - $1,499	Community Catalyst Partner $500 - $999
Collateral for Town Hall gatherings: print, electronic, social media	logo	logo	logo	logo	logo	name			
Complementary participation in one Town Hall for one individual	yes	yes							
Individual Memberships	8	6	5	4	3	2	1	1	1
Introduce Major Speaker at Town Hall	yes	yes	possible	possible	possible				
Town Hall general organizational communiqués: print, electronic, social media	logo and narrative recognition	logo and narrative recognition	logo and narrative recognition	logo and narrative recognition	name	name	name	name	name
Community Outreach Program Seats	8	6	5	4	3	2	1	1	1

Where can I find out more about development or partnership opportunities?

Rhonda Bannard is our consultant supporting our fund development initiatives as well as other efforts. Her direct phone number is 602-370-3560, and her e-mail is rhonda@inspiredconnections.net If Rhonda is not available, please contact Tara Jackson at 602-252-9600; e-mail tarajackson@aztownhall.org.

Is Arizona Town Hall part of any social media?

Yes, find us on

Are Continuing Legal Education credits available?

Yes. Attending a Town Hall program or training session generally qualifies for CLE credit.

Does Arizona Town Hall hire out as a consultant?

Yes. The Town Hall provides consulting services such as moderating meetings, facilitating discussions and training sessions. Fees are set on an individual basis. Interested parties contact Tara Jackson at 602-252-9600 for details.

NOTES

ARIZONA TOWN HALL
Creating Solutions for 50 Years!

Arizona Town Hall
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Phoenix, AZ 85012
602-252-9600
602-252-6189 Fax
townhall@aztownhall.org
www.aztownhall.org

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Arizona's Government:

THE NEXT 100 YEARS

The 97th Arizona Town Hall

November 7 - 10, 2010

Grand Canyon, Arizona

ARIZONA TOWN HALL

Creating Solutions

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ROY STANHOPE, Accounting

February 2011

The 97th Arizona Town Hall convened in November 2010 to develop consensus recommendations addressing the future of Arizona's government systems. The full text of these recommendations is contained in this final report.

An essential element to the success of these consensus-driven discussions is the background research report that is provided to all participants before the Town Hall convenes. The University of Arizona coordinated this detailed and informative background material and it provides a unique resource for a full understanding of the topic. Very special thanks go to H. Brinton Milward who spearheaded this effort, and marshaled top talent to write individual chapters. For sharing their wealth of knowledge and professional talents, our thanks also go to editors Amanda Jones and Ashley Harris, as well as the many authors who contributed to the report.

The 97th Town Hall was made possible through the financial assistance of our generous sponsors, which included Collaborating Sponsors Schaller Anderson, Inc. and Salt River Project; Supporting Sponsors Cox Communications, Inc., Snell & Wilmer, Virginia G. Piper Charitable Trust, and Wells Fargo; Civic Sponsors Horizon Moving, Mohave County, Osborn Maledon, P.A., Perkins Coie Brown & Bain, P.A., and Ryley, Carlock & Applewhite; Consensus Champions Cochise College and Fennemore Craig; and Associate Sponsors Farmers Investment, Hensley Employee Foundation, Kitchell Corporation, RBC Capital Markets, Sun Health Corporation and the Town of Oro Valley.

The consensus recommendations that were developed during the course of the 97th Town Hall have been combined with the background information coordinated by the University of Arizona into this single final report that will be shared with public officials, community and business leaders, Town Hall members and many others.

We believe that this report, containing the thoughtful recommendations of the 97th Town Hall participants, will guide the development of Arizona's future government.

Sincerely,

Bruce Dusenberry
Board Chair, Arizona Town Hall

The Arizona Town Hall gratefully acknowledges the support of sponsors who understand the importance of convening leaders from throughout the state to develop consensus-based solutions to critical issues facing Arizona. Our sincere thanks are extended to the sponsors of the 97th Arizona Town Hall.

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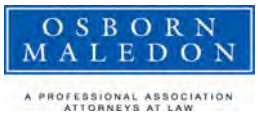

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Table of Contents

List of Acronyms

AACo: Arizona Association of Counties

ACIA: Arizona Commission of Indian Affairs

ACIC: Ak-Chin Indian Community

AJC: Arizona Judicial Council

ARS: Arizona Revised Statutes

CSA: County Supervisors Association of Arizona

EORP: Elected Officials Retirement Program

IRS: Internal Revenue Service

ITCA: Intertribal Council of Arizona

LACT: League of Arizona Cities and Towns

NACo: National Association of Counties

NCJS: National Crime and Justice Survey

NCSC: National Center for State Courts

PAC: Political Committee

PAG: Pima Association of Governments

P.L. 280: Public Law No. 83-280

PSPRS: Public Safety Personnel Retirement System

SB: Senate Bill (Arizona State Senate)

SRPMIC: Salt River Pima-Maricopa Indian Community

TO: Tohono O'odham Nation

"Arizona's Government: The Next 100 Years"

Grand Canyon, Arizona
November 7-10, 2010

Participants of the 97th Arizona Town Hall

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Susan Culp, Project Manager, Sonoran Institute, Phoenix
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Dina Higgins, Councilwoman, City of Mesa

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James Condo, Attorney, Ptr., Snell & Wilmer, L.L.P., Phoenix
Richard Geasland, Executive Director, Tumbleweed Center for Youth Development, Phoenix
Kathy Turner, Principal Consultant, Above the Line Consulting Services, Flagstaff

PLENARY SESSION PRESIDING CHAIRMAN

Bruce Dusenberry, Board Chair, Arizona Town Hall; President, Horizon Moving Systems; Attorney; Tucson

TOWN HALL SPEAKERS

Monday morning authors' panel presentation:

Paul Bender, Professor of Law & Dean Emeritus, Arizona State University, Tempe
David Berman, Senior Research Fellow, Morrison Institute for Public Policy, Arizona State University, Phoenix
Kim Demarchi, Partner, Lewis & Roca, Phoenix
Paul Julien, Judicial Education Officer, Arizona Supreme Court, Phoenix
H. Brinton Milward, Director, School of Government and Public Policy, Providence Service Corporation Chair in Public Management, University of Arizona, Tucson

Monday lunch panel discussion "Views from the Frontline":

Michael Grant (moderator), Attorney, Gallagher and Kennedy, Phoenix

Robert Burns, Fmr. President, Arizona State Senate; President, BGM Investments, Inc., Peoria
Ken Cheuvront, Arizona State Senate District 15, Phoenix; Owner, Cheuvront Construction, Cheuvront Wine & Cheese
Howard Fischer, State Capitol Bureau Correspondent

Monday dinner speaker:
Richard F. Callahan, Clinical Professor, Associate Dean and director of State Capital and Leadership Programs, University of Southern California

Tuesday breakfast speaker:
Kil Huh, Director of Research for the Pew Center on the States, The Pew Charitable Trusts

Tuesday lunch Special Presentation
High Altitude (vocal jazz) and Chamber Singers (classical)
School of Music, Northern Arizona University

DISCUSSION PANEL PARTICIPANTS

Aakhus, Todd: Director Community Partnerships Programs, Rio Salado College, Surprise
Adams, Kaylyn: Student, Paradise Valley Community College, Phoenix
Avant, Melissa: Regional Coordinator, First Things First, Sierra Vista
Baier, Maria: State Land Commissioner, Arizona State Land Department, Phoenix
Bartlett, David: Retired Attorney, Former Majority Whip, Arizona State Senate, Tucson
Beckvar, Karen: Leadership Development Specialist, AZ School Boards Association, Inc., Phoenix
Begay, Pauline: Apache County School Superintendent, St. Johns
Bender, Paul: Professor of Law & Dean Emeritus, Arizona State University, Tempe
Berman, David: Senior Research Fellow, Morrison Institute for Public Policy, Arizona State University, Phoenix
Betts, Steven: Ret. President & C.E.O., SunCor Development Co.; Attorney, Phoenix
Bidwill, Michael: President, Arizona Cardinals, Tempe
Borns, Kristin: Senior Policy Analyst, Morrison Institute for Public Policy, Phoenix
Burns, Robert: Arizona State Senate (Dist. 9); President, BGM Investments, Inc., Peoria
Butler, Kevin: Vice President, Administration, Cochise College, Sierra Vista
Calhoun, Gwen: City Council Member, Sierra Vista
Carlyon, Brad: County Attorney, Navajo County Government, Holbrook
Cassidy, Frank: Town Attorney, Town of Marana, Marana
Cea, Kendra: Area Manager; Customer Account Management, APS, Phoenix
Choshi, Khutso: Student, Pima Community Colleges, Tucson
Christensen, Becki: Executive Director, Springerville-Eagar Chamber of Commerce, Springerville
Clanagan, Russell: Council Member, Town of Marana
Clarke, Ray: Regional Vice President, Amity Foundation; Tucson
Colton, Arlan: Planning Director, Pima County Development Services, Tucson
Dale, Deborah: Executive Director, Arizona List. Tucson
Davis, Debbie McCune: Arizona State Senate, District 14, Phoenix
Decker, Lance: President, LL Decker & Associates, Phoenix

Delic, Elma: Student, University of Arizona; Chair, Arizona Students' Association, Tucson
Demarchi, Kimberly: Partner, Lewis & Roca, Phoenix
Dockter, Bruce: Retired Community Volunteer, Sierra Vista Regional Health Center Board Member, Sierra Vista
Eckstein, Paul: Attorney; Ptr., Perkins Coie Brown & Bain, P.A., Phoenix
Ensell, Gregory: Manager, Government and Public Affairs for Cox Communications, Phoenix
Erickson, Richard: Attorney, Snell & Wilmer, Phoenix
Escher, Patricia (Pat): Retired Judge, Pima County Superior Court, Tucson
Fritze, Emily: Student, University of Arizona, Tucson
Gallego, Katharine (Kate): Senior Energy Policy, Salt River Project, Phoenix
Genna, Ignazio (Eddie): Faculty, Liberal Arts Department, Phoenix College, Phoenix
Gilman, Richard: Organizer, Thinking Arizona, Tucson
Griffin, Marquisha: Councilmember, City of Maricopa, Maricopa
Gullett, Deborah: Government Relations Specialist, Gallagher & Kennedy, Phoenix
Haener, Mike: Lobbyist, Upstream Consulting Inc., Phoenix
Hauser, Lisa: Attorney, Partner, Gammage & Burnham, Phoenix
Hayes, Peter: Manager of Public Affairs, Salt River Project, Phoenix
Hemingway, Peter (Pete): Senior Vice President and Partner, Wood, Patel & Associates, Phoenix
Heredia, Luis: Executive Director, Arizona Democratic Party, Phoenix
Hill, Patricia (Pat): Director, State and Local Government Relations, Maricopa Community Colleges, Tempe
Hunter, Yvonne: Senior Public Affairs Rep., Public Affairs Department, Pinnacle West, Phoenix
Huntwork, James: Republican Member, Arizona Independent Redistricting Commision; Attorney, Salmon, Lewis & Weldon, Phoenix
Johnson, Michael: City Council Member, City of Phoenix
Julien, Paul: Judicial Education Officer, Arizona Supreme Court, Phoenix
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Report of the
97TH ARIZONA TOWN HALL
"Arizona's Government: The Next 100 Years"

Grand Canyon, Arizona
November 7-10, 2010

As Arizona approaches its Centennial anniversary of statehood, we as Arizonans rightly look back on the last 100 years with a sense of pride in what has been accomplished. We have built a strong and growing community, whose people have transformed Arizona into a vibrant state composed of diverse communities, industries, and interests. One of the measures of the success of our state is a representative government founded on the principles of individual rights, citizen involvement, and civic responsibility.

But we also look back with the knowledge that it was just a starting point and that there is much work left to do. Looking forward to our next 100 years, now is the time to take stock of what is not currently working and to develop solutions. It is also the time to consider what values should continue to animate our government and to bring our government in line with those values.

It is in this spirit that the participants of the 97th Arizona Town Hall, a diverse cross-section of Arizona residents from various communities and walks of life, met for three days of facilitated discussions designed to seek a consensus on how best to structure Arizona's government for the next 100 years. This report captures the consensus and proposals that emerged from those discussions. Although not every Town Hall participant agrees with every conclusion and recommendation herein, this report reflects the overall consensus achieved by the 97th Arizona Town Hall. We therefore offer these conclusions and recommendations, mindful of the words of Margaret Mead: "Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has."

I. Defining an Effective Framework

A. Historical Factors

Arizona was admitted to the Union in 1912, and from its inception Arizona's state government structure was rooted in the values of both the individualism of the "Old West" and the idealism of the Progressive Era. With many early Arizonans having trekked across the country to start a new life, one of early Arizonans' primary concerns was the protection of personal freedoms, independence, and individual rights. This was borne out by the adoption of Article II of the Arizona Constitution, which provides an extensive Declaration of Rights. Arizona also became one of the first states to grant women the right to vote, an issue that was raised at Arizona's Constitutional Convention. A strong emphasis was placed on the value of public education, as the Constitution states that education "shall be as nearly free as possible."

Finally, early Arizonans were particularly suspicious both of the undue influence of big business and the corruption of big government. Thus, they provided for "direct democracy" safeguards through the initiative and referendum processes.

We still hold many of the same values on which our state was founded. For instance, there remains broad agreement that we need a strong public education system. However, there is similar agreement that our state government has lost sight of this value over time. Our state public education system is plagued by many challenges, including underfunding, and our state needs to have a well-educated workforce with young people prepared to enter and complete post-secondary education.

In many other ways, we are not the same state we were in 1912. Arizona was a much smaller, rural, and agricultural state, focused on the "Five C's" – Copper, Cattle, Cotton, Citrus, and Climate. In 2010, Arizona has a substantial urban population and a need to incorporate the values of an increasingly diverse population. Modern Arizona must concern itself with a broader scope of issues, which include immigration, transportation, protecting vulnerable populations, international and interstate commerce, water rights, and diversifying our state's economy. Arizona government must also balance the needs of a growing population with the challenges of increasing budget shortfalls.

In light of these demands, some of the "direct democracy" safeguards do not necessarily serve to advance our values in the way first envisioned. For instance, the presence of initiative and referendum processes has allowed the Legislature to pass the responsibility for making decisions down to the people rather than dealing with important issues themselves. These processes are also susceptible to influence by out-of-state interest groups. Finally, initiatives can present serious budget problems given the limits on discretionary spending.

There are still benefits to these processes; for instance, there can be high quality initiatives, and this form of "pure democracy" allows the voice of the people to be clearly heard. However, the initiatives and referenda proposed to the electorate have increased in their complexity, in turn increasing the possibility of confusion at the polls. Additionally, the absence of serious public education about proposed measures, initiatives, and referenda do not provide the time necessary for the thoughtful and deliberative process desired by Arizonans.

B. The Role of Government

Although government cannot be all things to all people, the point of government is to do things that we cannot do individually or with cooperation among private parties. In the end, the goal of government is to work to promote the public good, serving as a catalyst, an innovator, and a facilitator. This requires both proper planning for the raising of sufficient revenues through responsible tax policies and the allocation of those revenues to serve the values and needs of Arizonans. In doing so, state government needs to be more proactive in developing long-term goals and strategies for the use of tax revenues, rather than being reactive to the crises of the day. Moving forward, Arizona will need to make difficult choices about how best to meet these values and needs.

State government should not simply help Arizona grow, but to grow "smart." One of the most critical missions for state government is to attract businesses and other private enterprises to Arizona. While the government should strive not to conflict with private efforts to bring businesses and jobs to Arizona, there are a number of things the government can do to provide a foundation for private sector growth and diversification of Arizona's economy. Included among them is incentivizing private enterprises. Arizona needs tools for attracting private enterprise, including options used in other states such as "tax increment financing" or a "deal closing fund," which may require amendment of the Arizona Constitution's Gift Clause to permit such incentives.

The government can also do a great deal of good in the areas of public safety, energy policy, environmental protection, the preservation and utilization of natural resources, and public health. The state's revenue-sharing structure permits cities and counties to develop local solutions to best serve local needs. A responsible tax policy needs to ensure adequate and stable local government funding.

The creation and maintenance of high-quality infrastructure is another sort of investment state government can make to promote the public good. Specifically, the state has an important role in providing leadership for developing, keeping current, and implementing a comprehensive transportation infrastructure plan, which is vital to all segments of the population. Safely maintaining and modernizing all modes of transportation for people and goods is an important objective. The state needs public transportation systems to meet the needs of individual communities with respect to increasing mobility and promoting economic development. Arizona also must promote and support the advancement of current and future technological infrastructure, especially as it relates to communications. Moreover, Arizona's desert environment places a premium on securing Arizona's water resources over the next 100 years, which is vital to our state's growth.

Above all, the recognized key to Arizona's future is education. State government should treat education as an investment to be made, rather than a cost or a burden. Thus, we need to commit to provide sufficient and appropriate funding to support education at all levels, including early childhood development, K-12, career and technical training, and higher education.

II. The Structure of Government: The Constitution and the Three Branches

A. The Constitution

The Arizona Constitution has many virtues. Its structure provides for the separation of powers between three coequal branches of government, laying out an effective system of checks and balances. Our Constitution has also created a "fourth branch of government" in the Arizona Corporation Commission, which regulates the rates and services of public utilities. The Commission's jurisdiction in these areas is exclusive of the other branches, serving as yet another check and balance in the structure of Arizona's government. Finally, the state Constitution is the key document enumerating the inviolable individual rights of Arizonans, providing a guarantee of such rights independent of federal interpretations of the Bill of Rights in the United States Constitution.

Although the Constitution's enumeration of individual rights is one of its strengths, its inclusion of a variety of provisions on specific issues, which are better left to state statutes, is one of its weaknesses. Ultimately, Arizona's Constitution should focus on the structure of government and the protection of individual rights, rather than the details of implementation.

There are specific constitutional provisions that should be reconsidered. Many of the funding provisions in the state Constitution provide unnecessary hurdles to the optimal structure and operation of state government. For instance, the constitutional debt limit of $350,000 is inefficient, untenable, and unpoliced. The debt limit should either be raised substantially or eliminated altogether – but if we are going to have a debt limit, the government should be held to it. Similarly, the supermajority requirement for raising revenues can hinder the Legislature from making the difficult revenue choices that need to be made. Thus, the supermajority requirement for raising revenues should be abolished.

The question of how best to adopt changes to our Constitution is difficult and invites a wide variety of different viewpoints. On the one hand, the current initiative and referendum processes, Arizona's traditional options for amending the Constitution, have their benefits. They permit citizens to focus on a specific constitutional question, and they provide a direct link for the public to become policy makers and to enact the laws they want.

However, "direct democracy" can have its drawbacks. For example, "direct democracy," in this context, can result in an inordinately large number of constitutional amendments on policy minutiae that would be better left to state statutes. This is proved true in Arizona, where we have had more than 100 amendments in fewer than 100 years. Moreover, these processes can lead to proposals that are not necessarily well thought out or even well written.

If Arizona desires to continue to use initiative and referendum processes to amend the Constitution, there should be changes to the process itself. For instance, Arizona could adopt a requirement of a supermajority vote in the Legislature to refer constitutional amendments to the people. Except in emergencies, a further idea would be to require bringing an issue to the voters in two separate elections. However, many of the participants believed that this proposal for two separate elections is unworkable and burdensome, unnecessarily requiring two separate sets of electors to vote on the proposal. Nonetheless, it needs to be at least somewhat more difficult to amend the Constitution.

For initiatives and referenda affecting statutes rather than the Constitution, sunset clauses would be an effective means of allowing voters to revisit issues that might have unintended consequences at different times or in different circumstances.

Constitutional amendments should be effected through modified initiative and referendum processes that permit well thought-out, well-vetted, and well-debated proposals on key constitutional issues to be put to the people.

B. The Executive Branch

Arizona's Executive Branch is strong in a number of ways. The presence of a line-item veto permits the Governor to reduce the general level of spending and also to eliminate

certain spending cuts that may otherwise be politically unpopular. Another strength of the system is having an independently-elected Attorney General. Indeed, the presence of a number of separate elected statewide offices gives Arizona the advantage of having a broad statewide perspective in executive leadership.

However, there are a number of ways in which the Executive Branch could be improved. For many of the administrative and technical positions, elections can do more harm than good. Positions like the Superintendent of Public Instruction, State Treasurer, and the Mine Inspector should be appointed, not elected. Moreover, such appointments should be based upon merit and meeting baseline qualifications, not unlike Arizona's merit selection system for judges. The office of Secretary of State should also be reformed, either by making the position appointed or by apportioning those duties to other agencies. However, elections should continue to be administered by an independently-elected official.

In that vein, although Arizonans have recently rejected a proposition to create the office of Lieutenant Governor, that decision should be revisited. Arizona needs a Lieutenant Governor to ensure continuity in the Executive Branch when the Governor can no longer serve. This is not an illusory problem; it has happened five times in Arizona's history. Twice this resulted in transferring control of the Executive from one party to the other, which entailed an instantaneous and dramatic shift in policy priorities. There is also a concern that the Secretary of State (currently next in line), whose responsibilities include overseeing elections and other administrative functions, will necessarily be faced with having to set an agenda for the state without the executive experience to do so. Thus, a Lieutenant Governor should not just serve as the next-in-line or simply be a re-named Secretary of State. Rather, the office should entail substantive responsibilities to both assist the Executive Branch and prepare the Lieutenant Governor for assuming office, if necessary.

Among these responsibilities, the state, led by the Governor and Lieutenant Governor, should engage in long-term and strategic planning. As stated earlier, economic development and tax policy planning are essential to Arizona's growth. Assuming responsibility for such planning is one of the greatest opportunities for the Executive Branch to take on a greater leadership role in the next 100 years.

C. The Legislative Branch

Although there are a number of opportunities for improvement, the Legislature does have some strengths. The fact that it is a citizen legislature creates many challenges, but it also furthers Arizona's original ideals of a citizen government.

One of the strengths of Arizona's Legislature has been the ongoing efforts to increase openness and accessibility to the public. For example, both committee meetings and the open sessions of both bodies of the Legislature are able to be viewed over the internet. This increases the opportunity for Arizonans to stay informed about the day-to-day actions of the Legislature.

Another strength is bicameralism, which provides a layer of checks and balances within the legislative body and results in slowing the process down, which in turn results in

more deliberative thought on bills. Additionally, Arizona's Legislature benefits from an experienced body of professional staff and the Arizona Legislative Council, who support its efforts.

There are at least three specific ways in which Arizona's Legislature can be improved. First, legislative pay needs to be significantly increased, including sufficient per diem travel and lodging rates for the counties outside of Maricopa County. This will encourage a broader base of citizens to seek election to the Legislature and permit a broader cross-section of citizens to serve, rather than simply those who can afford to do so. Additionally, increases in salaries in the Legislative Branch should extend to legislative staff to ensure that we are able to hire and retain the highest quality people.

Second, more needs to be done to increase institutional knowledge and decrease partisan bickering. One of the best ways to do this is to extend the length of terms, permitting legislators the opportunity to gain greater experience with the process of governing and to develop relationships across the political spectrum. In furtherance of this goal, term limits should be abolished. Additionally, staggering the terms of legislators, so that fewer legislators will be up for reelection in any given year, will also increase the number of "veteran" legislators.

Third, Arizona's legislative session needs to be lengthened. One hundred days is not sufficient time to govern a modern state facing complicated issues. As it currently stands, there are far too many bills introduced for legislators to adequately and deliberately consider and vote on them all in the time currently allotted.

More broadly, the Legislature needs to be more transparent. For instance, strike everything amendments may sometimes be necessary, but we need to limit them to ensure greater transparency in the legislative process. Also, there needs to be greater transparency in the budget process, with more open lines of communication between the Legislative and Executive Branches as to federal and state funding. Transparency can be further increased by revising the Open Meeting Law to include the legislative process as appropriate, and to provide a 72-hour notice period between a proposed final budget and its final adoption by the Legislature.

Further, our Legislature needs to be more responsive to Arizona's changing political climate. Arizona's growing number of Independents is not adequately served by a large number of uncompetitive or "safe" districts. Therefore, fair and competitive redistricting is essential to make the Legislature more responsive. Greater responsiveness will in turn increase citizens' trust in the Legislature.

D. The Judicial Branch

Arizona's Judicial Branch is not only the best structured of the three branches of government, but it is also one of the best state judiciaries in the nation. This is mostly owing to the effects of merit selection, which produces high-quality, skilled judges who are independent of the interests that would otherwise fund judicial elections. There is widespread recognition of the effectiveness of the merit selection system, and it should be expanded to

include all Arizona courts. The Judicial Performance Review process plays a critical role in merit selection and educating citizens and is yet another strength of Arizona's Judicial Branch. Other strengths include an emphasis on transparency, both in the courts themselves and in the agencies subject to the Judiciary's jurisdiction (such as probation services and juvenile detention centers), as well as the Judiciary's oversight of attorney and judicial discipline.

Nevertheless, there is still room for improvement. The current efforts of the Judicial Performance Review Commission and the Supreme Court to educate the citizenry about judges and the judicial system, including merit selection and retention, should be expanded and enhanced. Additionally, the mandatory retirement age of 70 should be abolished.

Further, for our Judiciary to retain its high quality and preserve its independence, we must provide the Judiciary with a more stable funding mechanism to accommodate the more than 11,000 cases filed every business day.

To help manage the ever-growing volume of cases, the Judiciary often relies upon Justices of the Peace. While Justices of the Peace need not be trained lawyers, they should be provided with greater legal education and training to maintain the high quality Arizonans expect from the Judiciary.

Finally, in order to continue to increase access to the judicial system, efforts need to be made to inform Arizonans about how the Judiciary works. A better informed citizenry will not only help to maintain the independence and quality for which Arizona's Judiciary is nationally known, but it will be especially helpful to litigants seeking to represent themselves.

III. Coordination Among Governments

While Arizona's state government does coordinate in some ways with local, regional, federal, and tribal governments, there is much room for improvement. Both state and local governments are mutually dependent on shared resources, and thus it is essential that they be able to work together collaboratively to ensure both economic development and proper resource allocation. In difficult economic times, this relationship becomes especially strained because of the overall lack of revenue. As an old proverb puts it, "When the watering hole dries up, the animals look at each other differently." In the same way, when revenues dry up, state and local governments must compete for the same scarce resources.

Unfunded mandates contribute to an adversarial relationship between all levels of government. There is a tendency to push responsibilities down to the next level of government without any thought as to how it will affect these other jurisdictions.

The state's habit of "sweeping" funds from local governments creates the same problem. The state needs to understand that revenue sharing is a two-way street. Local governments must have the flexibility to both collect and spend the revenues they have raised to fund the unique priorities of their communities. The state Legislature must ensure revenue sharing with local governments and address the concern of unfunded mandates. Rather than looking to local governments as a source for raising revenues for state priorities, the state should explore its own structural reforms regarding revenue collections.

Overall, there is a lack of transparency in the legislative process, especially in budgeting. This is exacerbated by the difficulty citizens and communities have in keeping track of legislative actions. The Legislature can give and take away funding without sufficient public scrutiny. With this in mind, the Legislature needs to better inform Arizonans about how tax dollars are spent. This could be accomplished by a 72-hour waiting period before action can be taken on a budget proposal, or by having a hearing in every legislative district on the proposed budget. Another problem is that not all state representatives are perceived to serve the interests of their constituents, especially in rural communities. This can be compounded by the inherent difficulty communities outside of Maricopa County have in keeping track of legislative action. One solution is to require the legislative process to comply with the Open Meeting Law, as applicable. Additionally, expanding technological access to both legislative sessions and actions—for instance, by making the most current information available on demand—would increase accountability at the state level.

However, accountability also requires citizens to be proactive in engaging the Legislature and other elected officials, and not just during election season. We need to have a unifying vision in order to make progress on these fronts. Change starts small, with conversations around the water cooler, and should extend to deploying the resources of governmental agencies and non-governmental organizations to further the dialogue among the different levels of government.

Interactions between state and tribal governments, though having improved somewhat in recent years as the Indian gaming industry has developed, remain complicated by a number of factors. For instance, these relationships remain informal, which can at times be awkward. The relationship can become especially difficult in light of the unique and complex issues of jurisdiction, sovereignty, and comity that exist between state and tribal governments. There has often been a lack of effective dialogue between these governmental entities. A better tribal liaison program will enable more effective communication, cooperation, and partnerships between the tribal and state governments.

Interactions between the state government and the federal government, at this point, are adversarial. There is a lack of an effective dialogue between the state and federal governments, which ultimately serves no one. For Arizona, this can result in limitations on access to federal programs and funds which could benefit the state. One possible solution is to develop a stronger relationship between the federal government and Arizona's local governments, including strengthening and expanding the roles of intergovernmental liaisons. There is a need for Arizona to have an active voice in Washington D.C. to ensure that Arizona is not just a "donor state."

State law also impacts how local, regional, and tribal governments interact with one another. For example, as a function of state law, there may be some overlap between some municipal, county, and tribal governments as to their functions and roles. This should be reviewed with a goal of increasing efficiency and lessening unnecessary competition over scarce resources.

In conducting this evaluation, we should keep in mind that various parts of our state are inherently different. For instance, rural and urban counties are not alike, and state law

should not always treat them the same or compel them to be run in the same way. Any structural reforms need to be undertaken with a clear understanding of the needs of the various regional, local, and tribal communities impacted to create individualized solutions for individualized problems.

Arizona should work to coordinate all levels of government to streamline the process of attracting new business and investment to the state. The Governor's Arizona Commerce Authority should be given statutory recognition and must work in cooperation with existing regional organizations to foster a healthy business environment and attract new business to the state.

One of the key priorities of the Arizona Constitution is to have a quality public pre-K-12 education system and strong public colleges and universities that are as nearly free as possible. But Arizona has an unequal funding formula for schools, with some entities having the ability to raise revenues and others not. This funding formula impacts the interests that local and regional governments have in this key Arizona priority. State government should examine new funding models for education, including a dedicated revenue source.

IV. Citizen Participation in Government

A. Civic Engagement is Essential

Citizen participation in Arizona's government is critical to its success. The more people who are engaged in the governing process, the more responsive the system will be to our needs. As a society, we need to develop mechanisms to attract all citizens to, and educate them about, the civic process.

This includes education on both governance and elections, which should take place on a non-partisan basis and should begin at an early age, but certainly no later than in a high school civics course, which should be mandatory. This is especially important in light of today's extremely partisan political climate. Thus, a mere civics course is not enough; efforts specifically focused on young people should also include outreach in the form of rallies, youth commissions, and social media. Civic education should continue after people enter the work force, and employers can play an important role in bringing employees together to learn about issues and to set up voter registration drives.

But knowledge without involvement accomplishes nothing. In addition to traditional means of civic engagement, like serving on a jury, all citizens need to be made aware of the numerous opportunities to become more involved, including through state and local boards, commissions, and task forces. We also need to encourage and foster non-partisan civic engagement though the use of non-governmental organizations. Our state would also be better served by more knowledgeable and better-informed leaders at all levels of government. We should not rely on "on the job training" for elected officials who must make decisions about many complex issues. Town Hall should engage with foundations, universities, colleges, and civic organizations to develop a certificate program that will train future leaders on the organization and functions of government, public finance, election laws, and other topics that will prepare citizens to become more effective leaders. To further civic engagement in the

legislative process, we should establish an online system that enables people to register and participate in legislative committee hearings without the need for a physical presence at the capitol.

Participation should be encouraged across all demographic groups, and citizens should take individual responsibility to educate themselves on civic involvement. With that in mind, there needs to be a strong emphasis on the development and practice of a culture of mutual respect which seeks to build consensus for the public good, through civic engagement and civil dialogue.

B. The Election System

Arizona's election system is out of sync with the values of our state's voters and does not meet our needs. Our system struggles with low voter turnout, which results from a number of factors, including the disillusionment of the voters, a lack of transparency in the process, and a general lack of sufficient factual information about candidates and issues. And the candidates themselves do not make things any easier, engaging in ongoing partisan bickering and spending millions of dollars on negative advertising that provides little to no information and only increases cynicism about the process.

Our system is also unresponsive to the needs and interests of an emerging plurality of registered Independents, who find themselves drawn to register as Independents due to the polarization of the two-party system.

Although voter registration is roughly evenly divided between Democrats, Independents, and Republicans, most legislative districts, as they currently stand, fail to yield truly competitive races. Arizona's Independent Redistricting Commission has failed to create competitive districts. Moving forward, the Independent Redistricting Commission should find a way to meet the requirements of the Voting Rights Act while also ensuring the creation of fewer districts which are non-competitive.

Arizonans passed the Clean Elections Act in the hopes of improving voter turnout, increasing candidate participation, and decreasing special interest influence. However, the Clean Elections system has largely failed to live up to its stated goals and should be repealed or reformed.

Arizona should continue its efforts to reform its elections process with new and creative ideas. In so doing, Arizona should look to both local communities and other states across the nation for ideas about increasing voter accessibility to both election information and to the electoral process itself. We should explore other primary election models to increase participation and competitiveness, such as a top-two primary. Access to the process requires proper accommodations be made for persons with disabilities. An important means of accomplishing this is through the better use of technology.

In fact, Arizona has the opportunity to become a pioneer in the use of technology in voting. In doing so, however, Arizona should be mindful to ensure that voters are not left on the other side of a "digital divide." Thus, in addition to considering internet voting, Arizona should also consider an all mail-in voting system similar to what was recently implemented

by many of our cities and towns. However, any voting reform needs to be mindful of the differences in education and skills of the voters so as not to inadvertently disenfranchise anyone.

Regardless of the mechanism, for Arizona's election system to meet our needs going forward, voters must have access to more information about what they are voting on. Thus, technological innovation in educating voters, in concert with more traditional means, like high school civic courses, should be used to inform voters about candidates and issues.

V. Getting There: Setting Priorities and Taking Actions

In light of the above conclusions, and to better serve the values and needs of Arizona, the participants of the 97th Arizona Town Hall offer the following recommendations for how best to improve Arizona's Government for the next 100 years:

Electing the Best People

Arizonans are best served by public servants of the highest quality. Accordingly, our highest priorities for improving the election system should be to:

- Abolish Term Limits. Legislators need the opportunity to gain greater experience with the process of governing and to develop relationships across the political spectrum. Terms should be extended and staggered to increase institutional knowledge consistent with redistricting every ten years.

- Create Competitive Districts. Legislators need to be more responsive to Arizona's changing political climate, including the increasing number of registered Independents. The Arizona Town Hall, its participants, and its alumni should immediately and regularly share our consensus belief in the importance of competitive districts with key decision makers throughout the current redistricting process, including the commissioner screening and selection process, the solicitation of public input, and the drafting and creation of districts statewide.

Other priorities include:

- Reform or Repeal the Clean Elections Law. The Clean Elections system is fraught with problems. It should be reformed or repealed.

- Increase Legislative Salaries. Professional salaries will encourage a broader base of more qualified lawmakers to seek election. Legislative pay should be increased, including per diem travel and lodging (and other associated costs) for the counties outside of Maricopa.

Empowering Government to Solve Problems

In order for a state of Arizona's size and needs to flourish, our state government must seek out "best practices" for good government. To that end, our highest priorities should be to:

- Eliminate the Supermajority Requirement to Raise Revenue. Having a supermajority requirement to raise revenues hinders the Legislature in being able to raise necessary funds, especially in difficult times when it would be politically unpopular to do so. Thus, the supermajority requirement for raising revenues should be abolished.

- Expand Merit Selection. Merit selection produces high-quality, skilled judges who are judicially independent. Thus, merit selection should be extended to all counties and include all Arizona courts.

- Review Arizona's Tax Structure. A reexamination of Arizona's tax structure is needed. The review should examine the ability of the state to raise revenue as well as the mechanisms in place relating to state, local, county, and municipal shared revenue. A review of the tax structure is necessary to provide a balanced, stable fiscal system without volatility as we move into the next 100 years.

- Develop and Implement Long-Term and Strategic Planning Processes for Arizona. Both long-term and strategic planning processes for Arizona need to take into consideration, among other things, the key issues of education, taxes and revenue, energy, water, and economic development, and cross-cutting issues like technology. Legislation should be introduced establishing a strategic planning commission (or like planning body) for Arizona, incorporating representatives of the Executive, Legislature, Judiciary, county and municipal governments, regional government, tribes, special administrative districts, including school districts, and the private sector. Among other duties, the Commission should provide, on an annual basis, information toward enhancing the relative competitive position of Arizona.

Other priorities include:

- End Unfunded Mandates and Legislative "Sweeps." Unfunded mandates and the "sweeping" of local and dedicated funds create an adversarial relationship between state and local governments. Local governments must be assured of the funds necessary to meet the needs of their citizens. Likewise, other constituencies and units of government who pay into dedicated funds should be able to depend on those funds. Thus, these practices must be ended, and a stable revenue sharing system must be ensured.

- Reform and Reorganize the Executive Branch. Arizonans do not need to directly elect certain administrative positions. The Mine Inspector,

Superintendent of Public Instruction, and Treasurer should be appointed by the Governor and confirmed by the Senate. These appointments should be merit-based and focused on qualification, rather than political affiliation. In addition, the duties of various Executive Branch departments should also be reorganized to improve efficiency.

- Raise or Eliminate the Debt Limit. The constitutional debt limit of $350,000 is unworkable for a state of Arizona's size and needs. Thus, the debt limit should either be raised substantially or eliminated altogether.

- Establish a Stable Funding Source for the Judiciary. To maintain the quality and independence of the Judiciary, we need to establish a stable funding mechanism for it.

Improving Direct Democracy

There is one key priority for improving the tools used for amending the Arizona Constitution:

- Reform the Constitutional Amendment Processes. The initiative and referendum processes permit citizens to engage in "direct democracy" while focused on a specific constitutional question, and they should not be abandoned in favor of constitutional conventions. However, these processes can result in an inordinately large number of constitutional amendments on issues that often would be better left to state statutes. Thus, measures should be implemented to assure that constitutional amendments have received due consideration.

Refocusing Government's Priorities

What Arizona hopes to achieve in the next 100 years depends upon the priorities we set for ourselves and our government. Going forward, our highest priorities should be:

- Education. Maintaining a strong public education system is a value Arizonans have held since statehood, but our current education system is underfunded and needs curriculum reform. While education is a cost in the present, it is also an investment for our future. Thus, we need to recommit to this value, make it a top priority for our government, and provide for and protect funding to support all levels of education in the state, while also addressing teacher, administrator, and student accountability and updating curricula to ensure student success. Our state's education system developed over many years, and it is large and complex. In order to assure the state is more effective in providing for the education of Arizonans, we should consider whether reforms to the structure and funding of the state's current system would enhance our ability to meet the constitutional goal for education.

- Economic Development. One of the most important things governments do is promote the growth of the state's economy by supporting existing businesses and attracting new businesses and other private enterprises using a broad inventory of economic development tools. An emphasis on economic development helps to create jobs and increase revenues. Government's efforts to diversify the economy will help provide stability in jobs and revenues through both expansions and contractions in the economy. To become more competitive, Arizona needs to recruit business in a seamless, coordinated, and united manner, and in a way that includes the coordinated efforts of the Executive Branch, the private sector, the appropriate regional and local governments, universities, community colleges, and school districts. Tools available to all other states, including tax increment financing, are also necessary to make Arizona more competitive. Thus, a focus on promoting economic development should continue to be a top priority going forward.

Other priorities include:

- Transparency in Decision-Making. Increasing the transparency of the governmental process furthers Arizona's rich tradition of valuing accountability in government and protecting individual rights. Moving forward, we should make every reasonable effort to make government more transparent and accessible, especially by using the latest technologies to connect all the people to their government, revising the Open Meeting Law to include the legislative process as appropriate, and providing a 72-hour notice period between a proposed final budget and its final adoption by the Legislature.

- Coordination Among Governments. There are serious problems in the way that state government currently works with local, regional, tribal, and federal governments. These relationships are inherently complex, and they are made even more difficult given overlaps in responsibility and authority, as well as the problems of shared and scarce financial resources. Governments must prioritize working together to achieve the common good for all of the diverse interests from across the state.

- Promoting Civic Involvement. Civic engagement goes beyond simply paying taxes and reporting for jury duty. It should be encouraged by governments in a nonpartisan way in both public and private forums, and it should begin as early as possible in the education of the current and coming generations of Arizonans. Governments must make promoting an effective, informed, and civil discourse within Arizona a key priority. Town Hall should engage with foundations, universities, colleges, and civic organizations to develop a program that will train future leaders on the organization and functions of government.

What Should We Do?

The responsibility for good government does not just reside in the halls of the capitol: ultimately, we the people are the government. It is therefore the role of every Arizonan to be involved in the communities in which they live. Citizens must be educated about important public policy issues and motivated to take action.

In order to do this, and to avoid having the recommendations of this report become just another "Strategic Plan on the Shelf," we, the individual members of the Arizona Town Hall, should commit to taking specific actions to effect needed change. First and foremost, we need to educate others about the consensus reached at this Town Hall. This can be accomplished by word of mouth, by speaking to groups with which we are affiliated, or by taking the time to write an article for our local newspaper. Additionally, groups of Town Hall members could come together to organize community forums, outreach programs to foundations and other non-profits, and perhaps even a "Mini Town Hall." Our student participants are uniquely equipped to carry the Town Hall's message back to their colleges and universities, in order to further involve younger Arizonans in bringing about needed change.

But education is only part of our responsibility. We must take direct political action. Participants need to contact their local, regional, and state representatives and express their support for these recommendations. It is also critical to register to vote, to volunteer in registering other voters, and ultimately to vote for those officials who support these necessary proposals. If the opportunity presents itself, we should also be prepared to directly place these recommendations before our governmental leaders, such as by speaking during the open portion of local governmental meetings, or even by working on drafting specific legislation.

In addition, citizens must be willing to run for public office and show real courage in representing our constituents to get things done, rather than worrying about reelection.

Finally, many of the proposals in this report require legislative action. Some will not likely receive initial support from elected officials and the public, both because they change things and because they may, taken alone, seem to limit rights and take away power. To achieve success, therefore, we believe a broad-based, well-organized, and well-financed effort to effect these changes is necessary. We recommend that those existing organizations that are focused on the state's future, together with Arizona Town Hall representatives, other interested citizens, and professionals of all types (including marketing professionals, lawyers, and others, all prepared to work pro bono), join together to organize this effort.

"A crisis is a terrible thing to waste," and Arizona, in 2010, is in a crisis. The collapse of our economy, the budget catastrophe facing state and local governments, and an underfunded and underperforming public education system are some of the symptoms of the underlying disorder. With Arizona's Centennial in 2012, the time for action is now, and we must take action in an expeditious manner. This is necessary to ensure that our government reflects the aspirations and proud spirit of the people of Arizona. We strongly recommend that the proposals in this Town Hall report be widely-disseminated and then implemented to ensure that our next 100 years are even better than our first.

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Arizona's Government:
The Next 100 Years

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Chapter 1

Why Institutions Matter for Good Governance

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Key Points

- How institutions are actually organizations providing rules and guidelines
- Institutions allow the citizens to act as a collective in order to receive benefits, goods and services they otherwise could not get alone
- How difficult it is to balance liberties and protection as an institution
- The influence of self-interest and human nature on the creation of our national institution and how it is still reflected in today's government
- Institutions are an important entity to protect our values
- Reform is very difficult and the unintended consequences that come along, or the baggage that reform can create whether it is intentional or unintentional
- If we treat institutions as experiments when it will increase our modesty and ability to provide services as well as allowing us to learn from the mistakes we have made

Introduction

Arizona's Clean Elections Law has received considerable attention recently. Opponents claim that its matching funds requirement infringes on the First Amendment's guarantee of free speech. Recently, they convinced a U.S. Supreme Court justice to enjoin the matching funds part of the law until the Supreme Court considers hearing the case.[i] Proponents claim that the law is necessary to lower the barriers for citizens to seek office, increasing voters' choices among candidates. Clean Elections candidates should be less beholden to special interests and lobbyists as they do not have to engage in a money chase, hence the title "Clean Elections."

Opponents and proponents of the Arizona Clean Elections law may differ on many issues related to the law, but they do share one thing in common: they understand that institutions matter for governance.

Institutions may be thought of as the rules and norms that permit, require, or forbid actions and behaviors. For instance, Clean Elections candidates are forbidden from raising and spending dollars over and above what they receive from the Clean Elections Commission. In turn, if a Clean Elections candidate faces a traditional challenger who spends more than the amount received by the Clean Elections candidate, the commission is to provide matching funds in order to level the playing field.

When referring to the U.S. Congress or Supreme Court, people often use the terms "institution" and "organization" interchangeably. However, Congress and the Supreme Court are more than

institutions (i.e., rules and norms), they are organizations. Organizations consist of the people who hold positions in the organization, the rules and norms (i.e., institutions) that guide people's actions, and the buildings, technologies, and capital that the organization has at its disposal. Returning to the Clean Elections example, the Clean Elections Commission is an organization, while the Clean Elections Law the commission administers is a complex set of rules and norms, i.e., an institution.

This chapter focuses on governing institutions and how they guide and constrain the behavior and actions of people and organizations so that socially desirable goals and values are realized. The rules and norms that create different branches of government, grant different powers to each branch, structure how citizens run for and hold office, and provide opportunities for citizens to directly participate in governance are just as important as the type and quality of people who hold public office.

Realizing good governance is not just a matter of voting "bums" out of office and replacing them with more civic-minded representatives. It is also necessary to design good government institutions that support and enable civic-minded representatives to engage in good governance and limit the damage bums can cause if they somehow manage to gain office.

This chapter explores why governing institutions are important and why they are difficult to reform.

Why Institutions Matter

At the most basic level, rules and norms allow people and organizations to achieve values and outcomes that they otherwise could not if they were to act alone.

Rules allow people to coordinate their actions and engage in collective action to achieve desired outcomes. For instance, a single household in a neighborhood of several hundred households would not be able to provide numerous amenities above and beyond what a city provides for its neighborhoods. In forming a neighborhood association, however, the residents of a neighborhood can work together to provide neighborhood benefits, whether it is landscaping, or block parties, or a neighborhood watch, or a collective voice to the city council.

Institutions—the rules that create and structure the neighborhood association—allow citizens to collectively realize goods and services they all benefit from. Plus institutions allow neighbors to develop close bonds and common values and come to a shared understanding of what it means to be a resident of the neighborhood and what is reasonable to expect of one's neighbors.

This understanding of institutions as a means of engaging in collective action to achieve shared values and outcomes is reflected in the preamble of the U.S. constitution:

> We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America.

How can the people of the United States collectively realize the values of justice and liberty while at the same time provide for the common defense and promote the general welfare? The

simple answer is through a constitution composed of rules that establish different governing bodies and positions and that grant those same entities different types of authority. But a closer reading of the preamble suggests a more nuanced understanding of institutional arrangements because it suggests a challenge: is it possible to design a national government strong enough to defend the country and realize national interests such as promoting trade and commerce without trampling on the liberties and freedoms of its citizens and states? How the designers of the U.S. Constitution addressed this challenge reveals a sophisticated understanding of how and why institutions are important.

Through the federalist papers, the constitutional designers explained and justified why they made the institutional choices they did and why they were the best choices. In justifying their decisions, e.g. why a bicameral legislature, or why an independent judiciary, they reveal an understanding of how institutions matter and the challenges of institutional design, that remain true today.

Institutions Provide Incentives for Action

The challenge presented in the Constitution's preamble—a national government strong enough to pursue national interests but not so strong as to trample liberties and freedoms—implies a reason why institutions are important and one that we are quite familiar with today. Institutions provide incentives for individuals to act. If the institutions are designed well, people will face appropriate incentives to act in ways that promote desired outcomes, e.g., national interests, but limit or dampen undesirable actions, e.g., abuse of power.

Acknowledging that institutions provide incentives that motivate action also acknowledges a particular view of human nature. For the designers of the constitution and for us today, human nature is to act out of "self-love" or self-interest. As James Madison so famously stated in Federalist Paper 51[ii]:

> But what is government itself, but the greatest of all reflections on human nature? If men were angels, no government would be necessary. If angels were to govern men, neither external nor internal controls on government would be necessary. In framing a government which is to be administered by men over men, the great difficulty lies in this: you must first enable the government to control the governed; and in the next place oblige it to control itself.

Since people act out of their self-interest, governing institutions must be designed so that as people pursue their self-interest, they also pursue the common interest.

Tying self-interest to the common interest is sprinkled throughout the U.S. constitution and the design of the federal and state governments. Their most basic features are grounded in harnessing self-interest in pursuit of the common interest. Establishing powers in three independent branches of government and allowing officials in each branch to act as a check on the other so that no single branch becomes all powerful places the self-interest of the different officials in the service of the common interest.

In creating a limited government by dividing powers among three branches that act as checks on each other, decision-making processes are slowed, allowing reflection, debate, and contestation to occur. As a long time student of federalism has described it, "The political process is one that

should enable human reason to be transformed from a consideration of momentary passion and immediate interest into a more general and long-term consideration of "policy, utility, or justice."[iii]

This concern with harnessing self-interest t**o** the common interest continues today as we devise and adopt institutional reforms. For instance, a common means of making sense of the choices and actions of elected officials is to assume that they act in their self-interest, with self-interest defined as seeking election or re-election. Tying the self-interest of the representative to the interests of her constituents by requiring her to win a plurality or majority of votes dampens her ambition, and the interests of her constituents are served.

However, many people express concerns over the ties between elected officials and constituents and reform efforts are undertaken to ensure the quality of those ties. Perhaps the self-interest of re-election motivates the representative to take advantage of her office's perks to gain an incumbent advantage and to become a career politician. Wouldn't citizens be better off, not by being represented by career politicians but by representatives who may hold office for only a limited number of terms? Or, in seeking re-election, representatives may pay too much attention to those who donate resources to their campaigns. Wouldn't citizens be better off if representatives were free to listen and engage with all of their constituents, rather than constantly chase money from a few? In either instance, the effort is to relate the elected official's interests with the interests of her constituents.

Institutions Promote Societal Interests and Values

Institutions do more than motivate action by providing incentives that appeal to self-interest. Institutions also promote and reflect societal interests and values. How are liberty and justice—the two values singled out in the Constitution's preamble—realized through institutions? Partly by defining appropriate incentives that discourage public officials from abusing their public offices, but also by devising institutions allowing a wide variety of interests and values to be represented, recognized, and protected.

For the founding fathers, one of the greatest threats to individual liberty was faction, or what today we would call special interests. If a faction were to control a legislative body, it could then adopt laws that promoted its interests while stripping other citizens of their rights and liberties. Minority factions were not problematic because they could easily be quashed through regular elections. Much more problematic were majority factions that invariably sought to trample on the rights and liberties of citizens not part of the majority. The challenge then became how to protect democracy, which is based on majority rule, from majority tyranny.

The solution was not simple because faction and liberty are inextricably linked. As Madison argued in Federalist paper 10, "Liberty is to faction, as air is to fire." He went on to note that a reasonable person would not advocate eliminating air to control fire, and neither should a reasonable person propose to eliminate liberty to control faction. How, then, to protect the liberty of all citizens in the face of faction?

The partial answer was to devise institutional arrangements that created a federal form of government consisting of many state governments and a national government that exercised

independent but concurrent authority. In Federalist 10, Madison succinctly explained how federalism dissipates the ability of majority factions to engage in mischief:

> The influence of factious leaders may kindle a flame within their particular States, but will be unable to spread a general conflagration through the other States. … A rage for paper money, for an abolition of debts, for an equal division of property, or for any other improper or wicked project, will be less apt to pervade the whole body of the Union than a particular member of it; in the same proportion as such a malady is more likely to taint a particular county or district, than an entire State. In the extent and proper structure of the Union, therefore, we behold a republican remedy for the diseases most incident to republican government.

Multiple limited governments would act to limit majority tyranny and prevent majorities from trampling on the rights of minorities. However, an even more direct institutional solution for realizing cherished values was adopted.

During the process of getting the colonies to adopt the U.S. Constitution, the designers also devised the Bill of Rights. These first 10 amendments to the Constitution recognize that certain rights that represented deeply held values required special attention and protection. Multiple limited governments were insufficient to protect these values. If the ultimate powers of governance resided in the people alone, then certain "inalienable" rights had to be reserved for the people alone, which could not be taken by or alienated by others, especially public officials.[iv]

Contemporary passions illustrate the importance of institutions as a means of realizing and protecting values from majority tyrannies.

In Arizona alone, several legal challenges to the exercise of majority powers are underway. One is the challenge, mentioned above, to the Clean Elections law, claiming that the citizens of Arizona, through the initiative process, overstepped their bounds and violated the First Amendment protection of free speech. Another is the challenges to SB 1070, claiming that a majority in the state Legislature and the governor have variously violated the powers reserved for the national government and/or the rights of citizens to be free of unlawful searches and seizures.

Whether the actions of a majority of Arizona voters, or the actions of a majority of legislators (and the governor) qualify as examples of majority tyranny remains to be determined. Institutional arrangements cannot guarantee that majority tyranny will not happen, but they can be used, as the designers of the Constitution understood, to establish means of correcting such errors. In this case, an independent judiciary will determine whether citizens and legislators have overstepped their constitutional authorities.

Institutions allow people to engage in collective action to realize shared benefits and common values. They do this by providing incentives for people to act, by guiding and constraining behavior, and by defining and protecting cherished values and interests. U.S. citizens have inherited rich traditions surrounding governing institutions and institutional design. We are constantly tinkering with the institutions that define governance. Consequently, it is important not only to reflect on institutions and why they are important, but also to consider the challenges of institutional design and reform, the topic of the next section.

Forming a More Perfect Union: The Challenges of Institutional Design

In the "Star Trek" television and movie series, Captain Kirk, the leader of the Starship Enterprise, would decide on a course of action and direct his crew to "make it so." Only if the design of institutions were as simple—where citizens or public officials agree upon a value or an outcome that they wanted to achieve, and then call up the appropriate rule or rules to make it so.

Instead, institutional design—creating or revising rules that provide appropriate incentives to accomplish agreed upon values and goals—is fraught with challenges and pitfalls for a number of reasons. People only imperfectly understand the consequences of institutions. And they have a difficult time making tradeoffs among divergent and conflicting goals and values. Furthermore, institutional reform does not occur in a vacuum. Rather, institutional reform takes place in complex settings composed of a variety of existing institutional arrangements, political cultures and values, socioeconomic trends, and problems and crises. Consequently, institutional design is more art than science and one should expect surprises when tinkering with rules.

The challenges and pitfalls of engaging in institutional design are many, but two of the more common ones will be explored, using examples from institutional reforms directed at state governments over the past 50 years.

Institutions Come with Known Baggage

Institutions are imprecise instruments, realizing multiple values and goals at once, even though some of those goals and values are undesired. We cannot simply "dial up" a value and then "dial up" a rule change that will achieve the value. Rather, when we "dial up" a rule change, that rule change is very likely to come with known desirable values and outcomes and known undesirable and unwanted outcomes. In other words, institutions carry baggage, i.e., multiple bundles of values and goals, only some of which are of our choosing. Consequently, from the very start, in deciding among institutional reforms we must accept that we will achieve desired and undesired outcomes.

An example of imprecise institutions is the professionalization of state legislatures. Beginning in the middle of the 20th century, professional associations and legislators began a push to provide additional resources to legislators to help them better perform their duties. These resources, in the form of salaries (not just per diem payments), staff that provided independent sources of information on policy issues and budgeting, and more days in session were intended to provide legislators with the time and resources to carefully consider and devise strong and innovative laws.[v] Legislatures would be better able to conduct the people's business independently of the pressures emanating from interest groups, governors, and federal and state agencies.

Empirical studies generally support the claims of professionalism advocates. Compared to citizen legislatures, more professionalized legislatures tend to have greater contact with their constituents[vi] and adopt more innovative types of public policies,[vii] and interest groups have greater difficulty in establishing and maintaining an effective lobbying presence.[viii]

However, just as critics of professionalization argued, and advocates downplayed, professionalization gives rise to an outcome that is little valued, that is, professionalization comes with some anticipated baggage: the career politician. As professionalization increases, turnover rates among legislators decreases. While state legislator turnover rates in general have

decreased over the past several decades,[ix] turnover rates of more highly professional legislatures are even lower than among citizen legislatures.[x]

Institutions Come With Unknown Baggage

Rules often create unintended and unanticipated consequences. Even an institutional change that appears to be simple—one that directly targets a single outcome—can produce unwanted surprises. In other words, institutions also come with unknown baggage.

An example of unintended consequences comes from the remedy for the "disease" of career politicians: term limits. As a scholar of the professionalism of legislatures explains:

> Professionalism in government has been the subject of frequent and heated debate in the United States over the last decade. The recent movement to limit the terms of legislators at both the national and state levels stems in part from perceptions that legislatures have become full-time assemblies inhabited by career politicians. The result, according to term-limit advocates, is that legislators spend too much time securing their positions in office or seeking advancement to higher levels of government and too little time attending to the public interest.[xi]

Limiting the terms of elected officials would be a direct means of sweeping career politicians out of office and instead replacing them with people who have greater experience and knowledge of the needs and concerns of average citizens. Elected officials would more likely be servants of the people rather than servants of their own careers.

Term limits have had their intended effect. In the states with term limit laws, turnover rates for legislators have significantly increased, whereas turnover rates in states without term limits have remained steady or have continued to decline.[xii] Career politicians have been swept aside. Some anticipated, if not intended, effects have also occurred. For instance the movement of elected officials from house to senate (also known as "churning") has increased.[xiii]

The unknown and undesired baggage of term limits has been the surprisingly negative impact on professional legislatures. Term limits do more than remove career politicians; term limits change how professional legislatures conduct their business. Furthermore, term limits amplify partisanship among all term-limited legislatures, not just professional legislatures.[xiv] For professional legislatures, terms limits remove experienced leaders and legislators. In turn, such legislatures are less influential in bargaining over and developing budgets relative to governors, and they adopt less innovative policies.[xv] As Kousser summarizes, "For better or worse, legislatures that were redesigned by the professionalization movement have been revolutionized again by term limits."[xvi]

In addition, in term-limited legislatures, majority parties tend to become less cooperative with minority parties, and members of minority parties are less likely to realize the passage of legislation they propose. Kousser speculates that this occurs because legislators are inexperienced and have shorter time horizons. Shorter time horizons means less time to develop personal ties across the aisle, and inexperience means greater difficulty in figuring out how to develop and pass major pieces of legislation. Consequently, the majority party devotes its limited time and experience to passing its own legislative agenda.[xvii]

Institutions are important tools for realizing collective aspirations and goals, but they are imperfect tools. We cannot know with certainty and precision the outcomes we will achieve when we change rules; consequently we are often surprised. However, we can anticipate the challenges of institutional design and the need to continue to tinker and revise as we seek to form a more perfect union.

Conclusion: Treating Institutional Designs as Experiments

In the front window of a souvenir shop in Stockholm, Sweden hangs the sign, "Probably the best souvenir shop in Old Town." In this age of hyper-commercialization, the sign is striking for its modesty. The shopkeeper does not claim that his store is the best shop in all of Stockholm, or that it was voted the best shop in Old Town by readers of a magazine. The sign simply proclaims that it is probably the best shop in its neighborhood, one of dozens in Stockholm. Citizens and public officials should likewise demonstrate similar modesty and humility when it comes to their institutional designs.

One form of institutional modesty is to treat institutions and institutional reforms as experiments rather than as perfected and final designs. Viewing institutions as experiments means that we understand that we are likely to make mistakes as we attempt to design better governing arrangements. Consequently, it is important to learn from experiments. Admittedly, learning and attributing effects to specific institutional changes is a difficult undertaking, for all of the reasons mentioned above.

Institutional changes are clunky; they induce a variety of outcomes, some desirable and others not so much, and in attempting to keep the desirable outcomes and rid ourselves of those not so desirable we are prone to setting off a chain of unintended consequences. Furthermore, institutional reforms interact with the environment in which they are adopted; an environment that includes the political culture of a state, the mood of its electorate, the structure, opportunities, and performance of its economy, and so on, making it difficult to tease out the effects of the institutional change versus the effects of the environment.

Thus, we should always take claims about institutional design and performance with a grain of salt until a careful vetting of the proposed institutional change occurs. Will it accomplish its intended purpose? What are likely or foreseeable unintended consequences? How can the reforms be exploited by factions to pursue their own interests at the expense of others? And finally, what modifications can be made to address those undesired but anticipated effects?

Another form of institutional modesty is the process by which institutional design and reform takes place. Institutions allow people with diverse and conflicting interests to realize collective benefits and shared values. Institutions do that by supporting mutually productive relationships. Mutually productive relationships are more likely to emerge in settings that encourage due deliberation, and where participants are treated with respect and reciprocity.

As the designers of the U.S. Constitution understood, it is possible to design good government by reflection and choice, rather than by accident and force.[xviii] In creating institutions that support good governance, citizens and public officials should take a lesson from our founding fathers and from the owner of the Stockholm souvenir shop, and adopt as their slogan, "Probably the best institutional reform to achieve mutually productive relations, at least for the time being, given the

alternatives."Admittedly, this is hardly a snappy motto, but it does reflect the importance of institutions and the challenges of institutional design.

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Chapter 2

The Arizona Constitution

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Key Points

- Provides a description of what the Arizona Constitution does including; designating state boundaries, outlines the structure of government, and declares our individual rights
- The Constitution is the law of the land, it is what the courts follow when interpreting and sets up how each branch of government is to function
- Provides a brief description of the Constitution as a whole from The Preamble to Article 30
- Arizona's Constitution provides additional sets of rights on top of the ones outlined in the Bill of Rights
- Arizona's Constitution focuses on individuals and their ability to participate in the government process and depends on citizens for specific tasks, such as recalls
- Gives a description of the special features unique to the Arizona Constitution including; method of amending, recall and impeachment process, taxation rules, public education rules, rights of employees, the creation and implementation of the Corporation Commission, and many others
- Describes many of the questions and issues facing the future of Arizona and its Constitution

Introduction

Arizona's Constitution is Arizona's fundamental law. It was adopted in 1912 by the people of Arizona as a condition of Arizona's becoming a state, and only the people of Arizona can change it. It designates the state's boundaries, describes the structure of Arizona's government, and declares the rights that people in Arizona are to enjoy. The Arizona Constitution has been amended more than 130 times since Arizona became a state. It has, however, not undergone any fundamental changes and retains its original structure and general character.

The Arizona Constitution was to a large extent a product of the early 20th century progressive movement in American politics. That background is reflected in its extensive set of individual rights protections that are designed to limit abuses of governmental power, as well as in its provisions providing for voter initiative and referendum, for the recall of all elected officials, for the regulation of public utilities by an elected commission independent of the Legislature, for the establishment of a strong public-school system, and for the protection of the rights of workers and the right to sue for personal injury.

The Constitution as Law

The basic rule of constitutional law is that a government's constitution is superior to all of the government's other laws—neither the legislature nor the people of a state have the power to adopt laws inconsistent with it. Change must come through constitutional amendment. Courts will not enforce laws that conflict with a state's constitution, and they will ordinarily require government officials to conform their behavior to the constitution's restrictions and requirements.

In Arizona, as in every other state in the United States, people live under two constitutions—the Constitution of the United States and the state's constitution. If there is no conflict between the two constitutions, they both apply. The Arizona Constitution, for example, permits voters to recall elected public officials. The U.S. Constitution, on the other hand, has no recall provision. But since nothing in the U.S. Constitution prohibits states from subjecting state officials to recall, Arizona voters may recall their governor, even though the president of the U.S. cannot be recalled. If the two constitutions conflict, however, the U.S. Constitution prevails. Arizona voters do not have the right to recall their United States senators because the U.S. Constitution specifies that senators are elected for six-year terms.

The application of two constitutions means that people in Arizona have the benefit of two sets of constitutional rights—those contained in the Arizona Constitution as well as those in the U.S. Constitution. State constitutions can recognize and enforce rights in addition to the rights that are protected by the U.S. Constitution, but state constitutions may not deprive people of rights protected by the U.S. Constitution. Article 18, § 6 of the Arizona Constitution, for example, provides that "[t]he right of action to recover damages for injuries shall never be abrogated, and the amount recovered shall not be subject to any statutory limitation." The U.S. Constitution says nothing on this subject. As a result, Arizonans have the constitutional right to sue for personal injury, regardless of whether that right exists anywhere else in the United States.

On the other hand, the U.S. Supreme Court has held that the U.S. Constitution generally prohibits the introduction of a defendant's confession into evidence, unless the defendant received Miranda warnings prior to confessing. Defendants in Arizona state criminal prosecutions therefore have the right to Miranda warnings, regardless of whether that right is recognized in or protected by the Arizona Constitution. Indeed, unless the U.S. Supreme Court changes its mind about Miranda rights, Arizona defendants would continue to have this right, even if the Arizona Constitution were to be amended specifically to prohibit Arizona police from giving Miranda warnings.

State constitutions also are not permitted to conflict with valid federal statutes. The Arizona Constitution, for example, could not exempt Arizona from the application of a congressionally enacted speed limit on interstate highways.

The Structure and Content of the Arizona Constitution

Here is a brief article-by-article synopsis of what is in the Arizona Constitution.

The preamble to the Arizona Constitution does not contain a list of constitutional objectives similar to those set out in the preamble to the U.S. Constitution—e.g., the desire to "establish Justice," to "provide for the common defense," or to "promote the general welfare." Arizona's preamble merely states that "[w]e the people of the state of Arizona, grateful to almighty God for our liberties, do ordain this Constitution." The U.S. Constitution contains no similar reference to God or a supreme being, beyond providing that Congress enact "no law respecting an establishment of religion, or prohibiting the free exercise thereof."

Article 1. State Boundaries. The first article of the Arizona Constitution establishes the state's boundaries. It authorizes the state Legislature, in cooperation with adjoining states, to alter those boundaries "upon approval of the Congress of the United States."

Article 2. Declaration of Rights. A Bill of Rights was not included in the original U.S. Constitution, but was added by amendments adopted four years after the Constitutional Convention. Protection of individual rights was, by contrast, a major concern of those who drafted and voted to adopt the Arizona Constitution. The Arizona Constitution's Declaration of Rights is contained in Article 2, its first substantive article. Article 2 states that "[a] frequent recurrence to fundamental principles is essential to the security of individual rights and the perpetuity of free government" (§ 1), and that "governments derive their just powers from the consent of the governed, and are established to protect and maintain individual rights." (§ 2)

Article 2 protects a wide variety of individual rights. Some of these are similar to rights contained in the U.S. Bill of Rights. For example, Article 2 prohibits the deprivation of "life, liberty, or property without due process of law" (§ 4), protects the rights to petition and to peaceably assemble (§ 5), guarantees the right "to freely speak, write, and publish on all subjects" (§ 6), guarantees the right not to have one's "home invaded, without authority of law" (§ 8), guarantees the right not to be "compelled in any criminal case to give evidence against [one's]self, or be twice put in jeopardy for the same offense" (Section 10), prohibits laws granting "privileges or immunities which, upon the same terms, shall not equally belong to all citizens or corporations" (§ 13), prohibits laws imposing "cruel and unusual punishment" (§ 15), protects the right not to have private property taken for public use without just compensation (§17), protects the right to trial by jury (§ 23), prohibits bills of attainder, ex post facto laws, and "laws impairing the obligation of a contract" (§ 25), and protects the right to bear arms (§ 26).

Article 2, however, also contains rights that are not included in the U.S. Bill of Rights. The most prominent of these are an extensive Victims' Bill of Rights (§ 2.1), a guarantee of the right of a person not to "be disturbed in his private affairs" (§ 8), a "liberty of conscience" (§ 12), the right not to have "public money or property . . . appropriated for

or applied to any religious worship, exercise, or instruction, or to the support of any religious establishment" (§ 12), and the prohibition upon the enactment of any law "limiting the amount of damages to be recovered for causing the death or injury of any person" (§ 31).

Insofar as Article 2 includes rights that are similar to rights protected by the federal Bill of Rights, there is a temptation to think that the framers of the Arizona Constitution were perhaps unnecessarily providing Arizona constitutional protection for individual rights already protected by the U.S. Constitution. That, however, was clearly not the case.

The Bill of Rights contained in the first 10 amendments to the U.S. Constitution originally applied only to restrict the actions of the new federal government—not to place limits on the actions of state or local governments. Nothing in the original Bill of Rights, for example, prevented states at that time from interfering with the freedom of speech, from prohibiting the free exercise of religion, from taking private property without just compensation, or from compelling self-incrimination or imposing cruel and unusual punishments. At the time the U.S. Constitution was adopted, protection against governmental abuses of that kind was provided, if at all, by state constitutions.

Amendments to the U.S. Constitution adopted after the Civil War subjected state and local governments, for the first time, to some significant individual rights guarantees. The 13th, 14th, and 15th Amendments abolished slavery, imposed due process and equal protection requirements on the states, and prohibited them from denying the right to vote on account of race. These amendments, however, did not contain any express U.S. constitutional protection for the rights of free speech, free assembly, or free exercise of religion. They also contained no protection against states taking private property without compensation, no guarantee of the right to trial by jury or the right not to be compelled to incriminate oneself, and no protection against unreasonable searches and seizures by police. During the latter part of the 20th century, the U.S. Supreme Court incorporated these rights into the 14th Amendment, making them applicable against state and local governmental action, but that process had not begun when Arizona's Constitution was adopted.

The framers of the Arizona Constitution, therefore, and the people of Arizona who voted to adopt it in 1912, saw its Declaration of Rights as the primary constitutional protection for individual rights in Arizona. Arizonans are entitled to the protection afforded by these state constitutional rights, as well as to the rights they have under the U.S. Constitution.

Additional individual rights protection in Arizona may be based on rights—like victims' rights and the right to recover for personal injury—that are not at all present in the U.S. Constitution. They may also result from a broader formulation of a right in the Arizona Constitution, as compared to the corresponding language in the U.S. Constitution.

Some Arizona rights, for example, are stated in a way that might make them applicable as limitations on private, as well as governmental action, whereas federal constitutional

rights are rights applicable only against government action. Broader Arizona protection of individual rights may also result from decisions of the Arizona Supreme Court that give more generous interpretations to language in the Arizona Constitution than the U.S. Supreme Court has given to similar language in the U.S. Constitution. When interpreting language in their state constitutions, state courts are not required to follow U.S. Supreme Court interpretations, even when the language in the two constitutions is identical.

Article 3. Distribution of Powers. Like the U.S. Constitution, the Arizona Constitution establishes a state government composed of three departments or branches—a legislative branch, an executive branch, and a judicial branch. Articles 4, 5, and 6 of the constitution, which are discussed below, establish the three departments.

Article 3 provides that these three departments of Arizona government "shall be separate and distinct, and no one of such departments shall exercise the powers belonging to either of the others." The U.S. Supreme Court has also recognized the separation of powers within the federal government, but has permitted a considerable degree of overlap, so that an issue may be one that two, or even three, of the branches of the federal government may have the right to address. Arizona's Constitution appears, by contrast, to call for a strict separation of governmental powers—to provide that each issue facing the government belongs either to the Legislature, the executive branch, or to the courts.

It is not entirely clear what the consequences are of this theoretically rigid separation, as compared to the more flexible federal design. One example of the difference may be illustrated by the treatment of rules governing court procedures. In the federal system, Congress has the right to prescribe those rules. The Arizona Supreme Court has held that in Arizona, on the other hand, the legislature has no power to enact procedural rules different from those that the judicial branch has adopted for itself.

Article 4. Legislative Department. Article 4 establishes the legislative branch of Arizona government. Unlike the corresponding article of the U.S. constitution, Article 4 does not contain a list of the things that the Arizona Legislature is empowered to do, such as to regulate commerce, enact criminal laws, protect property rights, etc. That is because the federal government is a government of delegated powers, which can only do what the U.S. Constitution authorizes it to do, while states have power to act on all subjects, unless they are prohibited from doing so by either the federal or the applicable state constitution. The Arizona Constitution imposes limitations on the Arizona Legislature, and also imposes some obligations on it, but it does not limit the authority of the state Legislature to any constitutionally prescribed list of subjects or purposes.

Article 4 is divided into two parts. Part 1, "Initiative and Referendum," deals with what is often called "direct democracy"—the power of the people to legislate without the cooperation of, and even against the wishes of, the elected legislature.

Part 2, "The Legislature," deals with the Legislature that is elected by the people. The placement in Article 4 of the people's legislative power before that of the elected

Legislature appears to accord with the Arizona framers' belief that "[a]ll political power is inherent in the people" (Article 2, § 2).

Article 4, Part 1 provides that, in Arizona, "the people reserve the power to propose laws and amendments to the Constitution and to enact or reject such laws and amendments at the polls independently of the Legislature." The people's constitutional power to propose and enact laws is exercised through the power of initiative. Pursuant to the initiative power, 10% of the number of people who voted for governor at the last prior general election may petition to place a proposal for new state legislation on the ballot. The proposal becomes law if approved by a majority of those voting on it. The governor has no power to veto an initiative approved by the voters in this way. A voter initiative may address any subject on which the Legislature itself can act; a voter initiative can also be used to repeal or amend something that the Legislature has already done.

The other legislative power that Article 4, Part 1 gives to Arizona voters is the power of referendum. Voters can use this power to decide whether to accept or reject bills that the Legislature has passed and that the governor has signed, and the Legislature can, if it chooses, refer legislation to the voters itself.

The number of signatures required to refer legislation to the voters is half the number that is required to put a voter initiative on the ballot—5% of the number of voters for governor at the last gubernatorial election. The referendum power was intended to be made especially effective in Arizona by Article 4's provision that legislative enactments do not generally go into effect immediately. Unless an enactment both addresses an emergency and is passed by a two-thirds majority in each house of the Legislature, it does not go into effect until 90 days after the end of the legislative session at which it was passed. That 90-day delay is provided in order to give voters the opportunity to call for a referendum. If sufficient referendum-petition signatures are gathered during that 90-day period, the law does not go into effect unless and until voters approve it in a general election.

Arizona courts have read Article 4 to exempt appropriations bills from the people's referendum power, and have also declined to review the question of whether an emergency actually exists when the Legislature declares that it does. As a result, the Legislature can effectively circumvent the people's referendum power if a bill passes by at least a two-thirds majority in both legislative houses and contains an "emergency clause."

Arizona's original constitution contained provisions that seemed to provide not only that the governor has no power to veto the results of initiative or referendum elections, but that the Legislature also has no power to repeal or modify measures enacted by the voters through either power.

The Arizona Supreme Court, however, interpreted this provision to apply only when a measure is passed by the affirmative vote of a majority of all of Arizona's registered

voters—not merely by a majority of those voting on the measure. Since voter turnout is never close to 100%, that decision had the practical effect of giving the Legislature the power to repeal or change laws enacted by the voters through initiative and referendum. By doing so on several occasions in the 1990s, however, the Legislature prompted voters to adopt a constitutional amendment that now provides that the Legislature may never repeal laws adopted by the voters, and may amend them only if the amendment is agreed to by three-fourths of the members of each house, and "furthers the purpose of" the voter-adopted law. Voter initiatives and legislation enacted through voter referendum can now be repealed only by voter initiative, or by a constitutional amendment.

Part 2 of Article 4 provides for a bicameral—i.e., two house—Legislature. The Arizona Senate is composed of 1 elected member from each of 30 legislative districts; the House of Representatives of 2 members elected from each district. An important question about state legislatures is how legislative districts are drawn. This has traditionally been done by the legislature itself. Recently, however, Arizona voters amended the Arizona Constitution to remove the power to draw legislative districts from the Legislature, and to vest it instead in an independent redistricting commission that is composed of citizens who are neither legislators nor government officials.

Since the U.S. Constitution requires state legislative districts to be of substantially equal population, states must redistrict their legislatures after each U.S. census. Arizona's new redistricting system has so far been in place only for the redistricting done after the 2000 census. That redistricting did not produce a significant number of more competitive legislative districts, as proponents of the new system had wished. Redistricting by a newly chosen commission will soon be done on the basis of the 2010 census.

Legislative salaries in Arizona are not currently set by the Legislature, as they were under the 1912 Constitution. A constitutional amendment adopted in 1970 created a commission on salaries for elected state officers. The commission is composed of five private citizens—two selected by the governor, and one each by the president of the Senate, the speaker of the House, and the chief justice. The commission recommends changes in legislative salaries; those recommendations are placed on the ballot at a general election, and do not go into effect unless approved by the voters.

Article 4, Part 2 also now includes term limits for state legislators—legislators may not serve more than four consecutive two-year terms in either legislative house. Legislators term-limited in one house, however, may immediately run for election in the other house, and may also run again for election to the same house after sitting out one two-year term.

The remainder of Article 4, Part 2 contains provisions similar to those applicable to Congress and to other state legislatures.

Article 5. Executive Department. Article 5 establishes an executive department headed by five independently elected senior executive officials—the governor, secretary of state,

state treasurer, attorney general, and superintendent of public instruction. Each is elected to a four-year term and each is limited to two consecutive terms.

The governor is given the broad power to "transact all executive business," and also the powers to convene the Legislature in extraordinary session, and to grant reprieves, commutations, and pardons. The powers and duties of the other four specified executive officers "shall be as prescribed by law" (Section 9). The order of succession to the governor's office, should a governor not serve out a term, is the secretary of state, the attorney general, the treasurer, and the superintendent of public instruction.

The constitution's provision for separate election of these five senior executive officials means that they are not part of a single unitary administration, as is true in the federal government, but may come from different political parties and/or have substantially different political agendas.

Separate election of Arizona's senior executive officials also means that, should a governor leave office during the governor's term, as has happened on several occasions, the new governor may come from a different party and have significantly different political objectives. The ballot at this year's general election contained a proposed constitutional amendment that would address this latter problem by replacing the secretary of state with a lieutenant governor, who would stand for election with the governor, and succeed to the office of the governor should the governor's term be cut short. The result of that election was not known at the time that this chapter was written.

Article 6. Judicial Department. Article 6 provides for one state Supreme Court, with broad statewide appellate jurisdiction, and a Superior Court to serve as the trial court of record in each county. The Supreme Court must be composed of at least five justices; the Legislature is authorized to increase that number, but has not done so. The constitution leaves to the Legislature the decision whether to establish intermediate appellate courts and/or courts inferior to the Superior Courts. The Legislature has created an intermediate appellate court of appeals with two divisions—one for the northern part of the state, the other for the southern counties and has provided for local justice courts.

The constitution adopted at the time of statehood provided that the state's judges would, like its legislators, be elected by voters for terms of years. This system for electing state judges was fundamentally changed in 1974 by an amendment to the constitution that established a merit-selection process for the selection of all state appellate judges, and for the election of Superior Court judges in Maricopa and Pima Counties. The system employs merit-selection commissions that choose at least three nominees for each judicial vacancy, no more than two of whom can be from the same political party. One-third of the members of the merit-selection commissions are nominated by the State Bar; two-thirds are nominated by the governor. All commission members are subject to Senate confirmation. The governor is required to choose from among the commission's recommendations. Merit-selection judges must stand for periodic retention elections, and need a majority of yes votes to remain in office.

Superior Court judges in counties other than Maricopa and Pima are still elected by voters for terms of years. The constitution requires that all judges retire when they reach age 70. As is true under the U.S. Constitution, the state Supreme Court has the last word regarding the meaning of the Arizona Constitution. It's interpretations are dominant, unless overruled by the Supreme Court itself, or superseded by a constitutional amendment.

Articles 7–30. The remaining 24 articles of the constitution deal with a variety of other subjects. Article 7 governs elections, Article 8 provides for the recall of elected officials, and Article 9—the constitution's longest article by far—governs taxation. Articles 10–14 deal in turn with state and school lands, education, the counties, cities, and corporations. Article 15 establishes an elected corporation commission to regulate and set rates for public service corporations, such as public utilities, telegraph and telephone companies, and common carriers. Articles 16–19 deal, in turn, with the state militia, water rights, labor, and mines.

Article 20 is unusual. It contains 13 provisions on various subjects that Congress required to be included in Arizona's Constitution as a condition of statehood, and that are "irrevocable without the consent of the United States and the people of this State.

Among other things, these articles secure "perfect toleration of religious sentiment" for all Arizonans, prohibit polygamy and the introduction of intoxicating liquor into Indian country, require the establishment and maintenance of a public school system "which shall be open to all children of the state and be free from sectarian control," designate Phoenix as the state capital until at least 1926, after which the capital may be relocated by a vote of the people, and require all state officers and members of the Legislature to read, write and understand English.

Article 21 provides the procedure for amending the constitution. Its provisions are described immediately below. Article 22 is a grab bag of miscellaneous provisions; Articles 23 and 24 dealt with liquor prohibition and have been repealed. Article 25 prohibits denial of the opportunity to work because of non-membership in a labor union, Article 26 gives certain rights to real estate brokers, Article 27 authorizes the Legislature to regulate ambulances, and Article 29 provides that "the official language of the state of Arizona is English." Article 29 deals with public retirement systems, and Article 30 provides that "[o]nly a union of one man and one woman shall be valid or recognized as a marriage in this state."

Some Special Features of the Arizona Constitution

The contents of the Arizona Constitution's Declaration of Rights and of its articles establishing the three departments of Arizona government, are generally described above. Some of the provisions in those articles, as well as several provisions in the constitution's

other articles, give the Arizona Constitution a somewhat distinctive character. This section addresses some of the most important of those distinctive features.

Mode of Amending. In accord with the objective of reserving a large measure of political power to the people, the framers of the Arizona Constitution made it extremely easy for voters to amend the Arizona Constitution. Article 22 of the constitution provides two ways for proposed amendments to be put before the voters without the need of a constitutional convention. An amendment can reach the ballot if it is proposed by a majority of each house of the Legislature, or if it is proposed by a petition signed by 15% of the number of people who voted for governor at the prior gubernatorial election.

A proposed amendment becomes part of the constitution if approved by a majority of the voters who vote on the proposal when it is put before them. The U.S. Constitution, by contrast, can be amended only if a proposed amendment is approved by two-thirds of each house of Congress and then ratified by the legislatures of (or conventions in) three-quarters of the states. The U.S. Constitution has been amended 27 times in more than 200 years; the much-easier-to-amend Arizona Constitution has been amended by Arizona voters more than 130 times in less than 100 years.

Both constitutions can also be amended through the convening of a constitutional convention, although that has never happened in either case. In Arizona, the people, rather than the Legislature, have control of the convention process as well. The Legislature can call for a convention only if a majority of the voters first approve of that idea, and amendments or revisions proposed by such a convention become effective only if approved by voters.

Recall and Impeachment. Part 2 of Article 8 of the Arizona Constitution provides for a legislative impeachment process applicable to all elected or appointed state officials. The process is similar to that contained in the U.S. Constitution. Part 1 of Article 8, however, gives Arizona voters, without the participation of the Legislature, the power to recall "[e]very public officer in the state of Arizona, holding an elective office, either by election or appointment" prior to the end of the term being served by the officer.

Recall, like amendment of the constitution, is accomplished through voter petition and voter ballot action. The process is initiated by a petition signed by a number of voters equal to 25% of the number of voters who voted for the elective office in question at the last election for that office. Elected officials can be recalled for any reason—there is no requirement to prove, or even allege, that the official has engaged in misconduct. If the required number of signatures is collected, and the official does not offer his or her resignation within five days, a recall election must be called.

A recall election does not consist of a simple yes or no vote on whether to retain the official in office, to be followed by an interim appointment or special election if the recall is successful. An Arizona recall election is instead essentially a new election for the remainder of the term of the recalled official. Unless the incumbent declines to be part of

the election, the incumbent's name is placed on the ballot, along with other candidates who are nominated according to law. The candidate receiving the highest number of votes—who may be the recalled official—serves the remainder of the recalled official's term.

The recall process may be invoked against officials who hold elective office at all levels of Arizona state and local government. A recall petition may be circulated against a member of the state Legislature as soon as five days after the legislator takes office; recall petitions against other state and local officials cannot be circulated until the officer has held office for at least six months.

Taxation. Article 9 contains detailed rules governing the taxation of property, as well as complex provisions placing various limits on state expenditures. Fiscal responsibility and limits on taxation are major themes of Article 9. It seems to require a balanced state budget by providing that "[t]he Legislature shall provide by law for an annual tax sufficient, with other sources of revenue, to defray the necessary and ordinary expenses of the State for each fiscal year" (§ 3). It contemplates that the state will incur debt, but provides that the aggregate amount of debt "shall never exceed the sum of three hundred and fifty thousand dollars" (§ 2).

Article 9 contains several important limits on the use of the state's taxing power. One of these is that "[n]o tax shall be laid or appropriation of public money made in aid of any church, or private sectarian school, or any public service corporation" (§ 12). Another is that "all taxes shall be uniform upon the same class of property" (§ 1).

Two recent constitutional amendments have imposed significant additional limits. Section 22 now provides that "[a]n act that provides for a net increase in state revenues" is effective only if it is passed by two-thirds in each house of the Legislature. Section 24 provides that governmental units within the state "shall not impose any new tax, fee, stamp requirement or other assessment, direct or indirect," on conveyances of real property. Another recent amendment limits the power of voters to increase the financial obligations placed on the state's general fund by providing that initiatives or referenda that propose "a mandatory expenditure of state revenues … must also provide for an increased source of revenues sufficient to cover the entire immediate and future costs of the proposal" (§ 23).

Public Education. The establishment and maintenance of a strong public educational system is a main objective of the Arizona Constitution. Article 11 obligates the Legislature to "enact such laws as shall provide for the establishment and maintenance of a general and uniform public school system," which must include kindergarten schools, common schools, high schools, normal schools, industrial schools, universities (§ 1).

All state educational institutions "shall be open to students of both sexes, and the instruction furnished shall be as nearly free as possible" (§ 6). "[S]ectarian instruction" is prohibited (§ 7). Proceeds from the sale and rental of state lands must be used to support

public education (§ 8) and, in addition, "the Legislature shall make such appropriations, to be met by taxation, as shall insure the proper maintenance of all State educational institutions, and shall make such special appropriations as shall provide for their development and improvement" (§ 10). As noted previously, Article 11 prohibits the Legislature from laying any tax or appropriating any public money "in aid of any . . . private or sectarian school."

The Rights of Employees. Employee rights are another prominent feature of the Arizona Constitution. Article 18 limits child labor (§ 2), provides for an eight-hour day for all state and local government employees (§ 3), prohibits labor "black lists" (§ 9), requires the Legislature to enact an employer's liability law imposing liability on employers when workers in "hazardous occupations" are killed or injured due to the "conditions of such occupation" (§ 7), and requires the Legislature to enact a workmen's compensation system (§ 8).

The common-law right of workers to sue their employers for damages is protected by constitutional provisions that prohibit employers from requiring employees to waive the right to sue as a condition of employment (§ 3), that abolish the "fellow servant rule," under which employers had been absolved of liability for injuries caused to an employee by another employee (§ 4), that require that the defenses of contributory negligence and assumption of risk "shall, at all times, be left to the jury" (§ 5), and that guarantee that "[t]he right of action to recover damages for injuries shall never be abrogated, and the amount recovered shall not be subject to any statutory limitation" (§ 6).

The Right to Recover for Personal Injury. The provisions of the Labor Article that have just been described have significance beyond the employer-employee context. In combination with section 31 of the constitution's Declaration of Rights, which provides that "[n]o law shall be enacted in this State limiting the amount of damages to be recovered for causing the death of injury of any person," these sections establish a general constitutional right to recover for injury caused by the negligence of others, or by defective or dangerous products or conditions. That right prevents Arizona's Legislature from eliminating or significantly diminishing common-law causes of action for personal injury, and from limiting the damages that can be recovered in such actions.

The Corporation Commission. The constitution provides for a popularly elected Corporation Commission charged with regulating the rates and services of public utilities. The commission's jurisdiction in these matters is exclusive of the Legislature.

Miscellaneous Provisions. The constitution contains a number of other provisions not generally found in the constitutions of other states. Article 12, for example, abolishes the common-law doctrine of riparian water rights, and recognizes "[a]ll existing rights to the use of any of the waters in the State for all useful or beneficial purposes." Article 19 establishes the constitutional office of a popularly elected mine inspector. Article 22, § 18 is a "resign-to-run" provision that prohibits elected officials from running for local, state or federal office unless they are in the last year of the term for which they were elected.

Article 18, § 22, provides that the death penalty is to be carried out through lethal injection. Article 23 makes English "[t]he official language of the state," and requires, although with a large number of exceptions, that "[o]fficial actions shall be conducted in English." And recently adopted Article 30 permits only "a union of one man and one woman" to be "recognized as marriage in this state."

Issues for the Future

Here is a sample of some issues that may merit consideration when thinking about the next 100 years of the Arizona Constitution:

Referenda, Initiatives, and Constitutional Amendments. Direct democracy has played a significant governmental role in Arizona's first 100 years. The process has not been without its problems. Petition and ballot-issue campaigns are expensive. Ballot propositions are often poorly drafted or so complex that they are difficult for voters to understand. Ballot-issue campaigns are frequently waged through campaign ads that do not accurately present the issues to voters. Constitutional amendments may be adopted by the affirmative vote of a very small percentage of qualified voters. The Legislature has very limited power to modify laws adopted through voter initiative or referendum. Do the Arizona Constitution's direct democracy features continue to make sense as an important part of Arizona government, and, if so, can the process be improved through constitutional change?

Election of Senior Executive Officials. Does it make sense for positions such as superintendent of public instruction, attorney general, state treasurer, and mine inspector to be filled by independently elected officials? Or would the state be better served by a more unitary executive branch, in which these posts would be filled by gubernatorial appointment, with legislative confirmation, of trained professionals in the various fields?

Term Limits. Have these been helpful in improving the quality of Arizona government? If retained, can their operation be improved?

Legislative Salaries. Legislative salaries in Arizona have remained extremely low, as compared to legislative salaries in many other states. Would the Legislature's ability to deal successfully with the issues that come before it be improved by a different salary structure?

Taxation and Finance. The constitution's provisions requiring a balanced budget and limiting state debt have not been as effective as the framers planned them to be. Are there useful changes that could be made in the relevant constitutional provisions? Have constitutional amendments limiting the Legislature's ability to raise revenue served the state's best interests?

Public Education. Arizona's public-school system is poorly financed as compared to systems in other states, despite the Arizona Constitution's framers' apparent belief that an adequate public school system is essential to the state's welfare. Should that still be an important state objective and, if so, how can it best be achieved? Is there a way to better fulfill the framers' aspiration to have state universities that would be "as nearly free as possible"?

Regulation of Public Utilities. Does an independently elected Corporation Commission, free of legislative control, remain the best way to regulate utility rates and services?

Recall of Elected Public Officials. Does the ability of voters to recall elected officials continue to serve a useful function?

Competitive Legislative Districts. Are there further changes that could be made in the redistricting process to increase the percentage of competitive legislative districts and encourage greater public participation in elections?

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Chapter 3

The Legislature and Arizona Government

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Key Points

- Provides brief overview of the Arizona legislative system, including explanation of Legislative districts, information on eligibility to run, etc.
- The Arizona Legislature is considered a part-time citizen legislature and therefore has specific term limits and a reduced pay scale.
- The Legislature operates under Arizona's clean election law, which was intended to provide public funding for some statewide candidates but it is controversial and often challenged.
- The state of Arizona has been embroiled in controversy regarding the drawing of election districts and has adopted a 5-person commission that oversees the mapping of legislative districts.
- There is a belief that political polarization has increased within the Arizona legislature.
- Because of polarization, some believe that certain legislators do not accurately represent a majority of Arizonans. In order to fight polarization, reforms should be made.

Introduction

The Arizona Legislature is the lawmaking and budget-making body of state government; one of three co-equal branches (legislative) along with the executive and judiciary. The 90 members of the Legislature are elected by the people of their district by a simple majority vote (except in the case of vacancies).

Individual constituents, special interest groups, state agencies, or the governor can suggest legislation proposing a state budget or changes to state law, but only legislators may actually introduce bills for consideration. All legislation must be passed by a majority vote of both chambers before it is sent to the governor. Some bills, such as those that increase state revenue and those that have an emergency clause, require a supermajority of the affirmative vote of at least two-thirds of the members of each chamber.

The Arizona Legislature has undergone a number of structural changes in the state's 98-year history, and additional changes are likely to be made in the future. As with any human institution, opinions change with time and circumstances and often lead to a process of reformation. Today, some of the frequently cited problems with the

Legislature are being met with various proposals for reform. Some of those will be examined in this chapter.

Framework of the Arizona Legislature

The legislative branch of state government[i] in Arizona is made up of a bicameral legislature: the state Senate and the House of Representatives.[1] There are 30 legislative districts in the state, with each one represented in the Legislature by one state senator and two representatives. All members are elected for two-year terms, meaning the entire assembly is up for reelection at each even-year general election. Members run on a partisan ticket as nominees from their party; currently Republicans are the majority in both chambers with Democrats the minority party. Currently, there are no third-party or Independent members of the Legislature.

The Arizona Constitution gives the people of the state equal consideration for creating legislation by using the citizen initiative and referendum process.[ii] By collecting signatures of registered voters, proponents may place propositions on the ballot and, if a majority of the voters who vote at the election approve them, the people can enact changes to state law and amend the Constitution without the involvement of the legislative or executive branches.

Initiative measures now enjoy an additional measure of protection that conventional legislation does not. A 1998 initiative approved by voters amended the Constitution to say that the Legislature cannot change any voter-approved initiative measure except by a three-fourths supermajority, and then only to further the purpose of the original proposition.[iii]

In each year ending in "1", i.e., once every decade, an independent redistricting commission redraws the legislative district lines based on the most recent decadal census. Each district is intended to have approximately equal numbers of residents. Districts are drawn based on total population, not number of registered voters. Districts are to be contiguous and include "communities of interest" to avoid gerrymandering. Politically competitive districts are recommended but are not required. Currently, each legislative district in Arizona contains approximately 171,000 people.

A person running for the Legislature must be a citizen of the United States, at least 25 years old, never have been convicted of a felony, proficient in the English language, a resident of the state for at least 3 years, a resident of the county in which he or she intends to run for at least 1 year, and a resident of the legislative district in which they are running at the time of filing for the office. In order to appear on the ballot, candidates must file nominating petitions containing the signatures of 1-3% of the total voter registration of the party members in the district in which the candidate is running.[iv]

[1] The State of Nebraska is the only one that has a unicameral, or single-chamber, legislature as the result of a constitutional initiative measure passed in 1934.

The Legislature convenes at the Capitol on the second Monday of January for its annual session. In addition, the governor may call the Legislature into special session at any time, but must identify the subjects to be addressed. Only those issues identified in the call may be legally enacted. By legislative rule, regular sessions are supposed to conclude by the Saturday in which the 100th day of the session falls. But that rule is frequently ignored without penalty.

All bills that are enacted must be read three times in each chamber unless approved by a two-thirds supermajority. Bills are assigned by the presiding officer to one or more committees in each chamber where they are discussed and debated, and where members of the public have an opportunity to provide testimony in support or opposition. In recent years, the Legislature has installed an electronic system in which individuals or groups can enter their support or opposition to various bills remotely from their home or office computers.

By legislative rule, all bills enacted must be approved by each chamber's rules committee, which verifies their form and constitutionality. All bills must also be presented to the party caucus meetings for discussion.

All members in the Committee of the Whole debate committee-approved bills on the floor of their originating chamber in order to finalize language. Bills are then scheduled for a final vote before moving to the other chamber.

A quorum of members, defined as a simple majority, must be present on the floor in order to conduct business. A simple majority of 16 in the Senate or 31 in the House is required to pass most bills, except for those that require a supermajority. Only the elected members have the ability to cast a vote in their respective chambers; there is no proxy or absentee voting permitted.

A controversial feature of the legislative process is the issue of "strike everything" amendments. Under this procedure, all the contents of a particular bill are removed and an entirely new legislative concept is put in its place. This occurs more frequently toward the end of a session as bills become stalled in committee. A bill sponsor will find another bill that is still alive in the political process and use it to resurrect the concept that may have died in the previous bill. This process often angers advocates of open, transparent government processes because the "strike everything" amendment can be adopted without full debate through the committee process, effectively short-circuiting the full legislative process.

Both chambers must approve identical bills before they can be transmitted to the governor. If different versions of the bill emerge from the two houses of the Legislature, the bill may go to a conference committee to work out compromise language, which then must be approved by both chambers. The governor may sign a bill into law, veto it, or allow it to go into law without his or her signature.

In a typical year, between 1,000 and 1,400 bills, memorials, and resolutions are introduced, and about 25% are passed.

Bills generally go into effect 90 days after adjournment of the session in order to permit the citizens to file a referendum petition. However, bills with an emergency clause go into effect immediately. A two-thirds vote of each chamber is required to approve a bill with an emergency clause.

Legislative Organization

Each Legislature covers a two-year period, with the first session following a general election identified as the "First Regular Session" and the one convening the following year as the "Second Regular Session." As noted earlier, the governor may call special sessions at any time, sometimes occurring concurrently with a regular session. Members of the Legislature, by a petition containing at least two-thirds of the members of both chambers, may compel the governor to call a special session.

Each chamber of the Legislature elects its own leaders and adopts its own set of rules for legislative procedure. Each chamber typically elects a leader (president in the Senate, speaker in the House) and an assistant or pro tempore leader. Leaders are responsible for appointing chairs of committees and hiring professional and support staff. The political parties organize themselves into party caucuses and elect their own majority or minority leaders, assistant leaders, and/or whips. Leadership in each chamber appoints committee chairs and vice chairs. The Legislature itself is responsible for disciplining its own members and may, by a two-thirds vote, expel a member.

In each chamber, the presiding officer exercises significant control over which bills ever have a chance of passage through a variety of procedural mechanisms. The speaker and president have the exclusive authority to assign bills to committees; they may send a bill to one committee, multiple committees, or no committee at all. And, once assigned, various committee chairmen have control over their own agendas and whether to hear a bill or not in their committees. After a bill is passed out of committee, the speaker or president may simply choose to hold it and not allow it to be heard on the floor. There is no procedural step to force the presiding officer to schedule a bill for floor debate.

Caucus meetings are held weekly during the majority of the session—more frequently as the session winds down—and are typically led by the majority or minority whip. These meetings give members an opportunity to share their comments about bills and ask questions of the sponsors, perhaps leading to the discussion of possible floor amendments. Caucus meetings are not formal debates, but give leadership a general idea of the chances of success for various bills. In most cases, party caucus meetings are open to the public.

Bills introduced by members of the minority party frequently have a slim chance of being heard in committee, much less passed into law. Standing committees, whose members are appointed by the presiding officer, always have a majority of members from the majority

party and on most issues, they vote together as a bloc. Members who deviate from the party position too frequently may be removed from a committee, thereby losing influence in the political process.

Citizen Legislature and Term Limits

Service in the Arizona Legislature is envisioned to be a part-time endeavor, meaning it is a legislative body made up of a cross-section of average citizens rather than those who consider "lawmaker" their primary occupation. Many legislators are employed in the private sector or operate their own businesses or partnerships, enabling them to devote several months each year to their legislative duties.

The legislative pay schedule is developed by an independent commission and placed on the general election ballot for voter approval.[v] Fifteen of the last 17 proposals to increase legislative pay have been defeated by the voters, and legislative pay today is set at the 1998 level of $24,000 per year plus per diem of $35 per day for the first 120 days, and $10 a day thereafter. Legislators from outside Maricopa County receive $60 for the first 120 days and $20 thereafter. Legislators are enrolled in the Elected Officials Retirement Program (EORP), a state retirement system administered by the Public Safety Personnel Retirement System (PSPRS).

In 1992, Arizona voters approved an initiative proposition that imposed limits on all legislative terms. It limits senators and representatives to no more than four consecutive terms (eight years total) in each chamber. Legislators frequently move from one chamber to the other when they have reached their term limit. There is a "sit out" provision that allows someone to re-start his or her term-limit clock after being out of office for one full term.

The term limits movement in the early 1990s grew out of a frustration with long-entrenched members of the federal government and the perception of an abuse of power. Since federal-level term limits can only be approved by Congress, activists turned to states and cities to enact them. Some kind of a term limits scheme has appeared on the ballot in 23 states that have the initiative process. Today, 15 states still have term limits for members of their state legislatures. Other states have either repealed their term-limits laws or courts have ruled them unconstitutional.

Advocates of term limits say they preserve the citizen nature of the Legislature and avoid the corrupting influence of career politicians. Opponents generally argue that legislative service is a learned skill like any other profession, and that having a continual procession of freshman legislators leads to an increase in influence by legislative staff and lobbyists. They also cite the inexperience of legislators as a reason for why fewer big-picture reform proposals succeed at the state level.

Since major legislation often has to be proposed several times before compromise language is eventually developed that enables it to pass, legislators with a short time horizon are less likely to tackle it. Instead, some argue that they pursue short term,

headline-grabbing legislation in order to make an impression on their constituents and secure reelection.

Increasingly, the state Legislature is the first elective office for candidates rather than having first served on local school boards, special districts boards, or city councils. As a result, local governments are required to educate incoming legislators about the close interrelationships between the various levels of government in the state, and how they are essential to one another's success.

For example, cities and towns often have to inform legislators about the shared revenue system enacted by voters decades ago that distributes a portion of state-collected revenues to local governments. Under immense pressure to balance the state budget, members often think of these funds as available for their own use, disregarding the historical commitment made to cities and towns, and the potential adverse impact on residents in their own districts.

Critics of term limits point out that institutional memory is lost when legislators are forced to end their service at a given time, and new members, who may not be aware of bills that were debated in previous sessions, are brought into the process. Opponents add that there are no term limits for lobbyists or legislative staff, and assert that since knowledge is power, the balance of power has shifted to those non-elected groups who have no obligation to serve the broader good of society, but only their clients or their institutions.

It is difficult to compare the influence of lobbyists and staff today to earlier times when legislative rules and processes were different. However, there is no mistaking the fact that both those groups do exercise a substantial amount of influence in the development of legislation today. It may or may not be different from past eras.

One feature of the Legislature that is different from past eras is the level of complexity of the issues, often leading to more lengthy sessions. In recent years, legislative sessions have tended to go far beyond the 100-day mark, often ending just before the beginning of the new fiscal year on July 1. The 2009 Legislature broke all records by having a series of special sessions that lasted into September before passing final budget bills.

Since the regular sessions can take approximately half of the calendar year, in addition to time for special sessions, interim committees, and constituent meetings, being a legislator in Arizona is virtually a full-time job, even though it is not defined or paid as such. As a result, many potential candidates are reluctant or unable to leave their professional careers or businesses to assume this "part-time" position at a very low salary.

Some believe this situation has created an environment in which the only people who seek legislative offices are either financially independent or committed ideologues who would pursue elective office in order to advance their political ideas, regardless of the pay level or time commitment.

Campaign Finance and Clean Elections

In 1998, voters approved the Citizens Clean Elections Act, a mechanism providing for public financing of legislative and other statewide candidates.[vi] The Citizens Clean Elections Act establishes a specific amount of funds for each qualifying candidate's campaign expenditures by restricting private campaign contributions to a specific number of individual $5 donations and holding candidates to spending limits in each election cycle. Additional spending is prohibited and may result in a violator being removed from office.

The intent of the Citizens Clean Elections Act was to neutralize the influence of special interest groups and wealthy individuals on elections and to place candidates on a more equal footing when competing for votes. In part, this system emerged from the highly publicized "AzScam" scandal of 1991, when 10 legislative members resigned or were removed from office after they were caught on hidden cameras taking cash payoffs.

The mission of the Clean Elections Commission is "to improve the integrity of Arizona state government and promote public confidence in the Arizona political process." Funding comes primarily from a combination of assessments on court-imposed civil and criminal fines and voluntary donations. In the 2008 elections cycle, 65% of eligible candidates ran their campaigns under this system.

Has Clean Elections succeeded in its mission? There are conflicting opinions.

On the one hand, some say that the influence of money and special interests will never be removed from the political process, that by its very nature political power attracts financial interests. These people also claim that by treating candidates equally, those whose appeal would ordinarily be limited due to their beliefs and philosophy have the same access to voters as those whose opinions are more popular. Furthermore, critics say this has led to the ability of otherwise marginal candidates on the political left and right to be elected to the Legislature when they would otherwise not attract enough private financing to be viable candidates.

On the other hand, supporters say Clean Elections has expanded the opportunities for people to become involved in the political process and has blunted the impact of special interest groups. They point to debates sponsored by the commission that give all candidates the opportunity to be heard, and argue that rather than continually seeking donations, candidates spend more time interacting with voters.

The Phoenix-based Goldwater Institute has challenged the constitutionality of the Clean Elections system, claiming it violates the First Amendment provisions regarding free speech. In January 2010, U.S. District Court Judge Roslyn Silver agreed and ruled that the matching funds portion of Clean Elections is unconstitutional. The case was appealed to the Ninth Circuit Court of Appeals—which reversed the ruling—and eventually went to the U.S. Supreme Court. On June 8, 2010, the Supreme Court issued an order to

enforce the District Court's injunction against the use of matching funds until the Court rules on the underlying appeal of the Ninth Circuit decision.

Redistricting and "Safe" Districts

Arizona has a long history of contentious behavior when it comes to the drawing of legislative districts and the basis for electing senators and representatives.

From statehood until 1966, senators were elected from the state's various counties, without regard to population. The original Arizona Constitution specified either one or two senators per county, later changed to two senators from each county. Since rural areas had much smaller populations but many more total counties, agricultural and cattle interests dominated the state Senate. Members of the House of Representatives were elected on the basis of population, also within counties. Politically, this led to the dominance of the Democratic Party in Arizona politics for the first 50 years of the state's existence.

The 1965 lawsuit, *Klahr v. Goddard*[vii] forced the redrawing of the state's congressional districts in order to comply with the U.S. Supreme Court's principle of "one man, one vote." In its ruling, the court said the existing apportionment scheme was "shot through with invidious discrimination," in some cases producing disparities of nearly four to one. The 1966 reapportionment, drawn entirely based on population, caused a seismic shift in Arizona political power. Rapidly growing urban areas of the state, particularly Maricopa County, saw their influence suddenly mushroom and, for the first time in the state's history, Republicans became the majority party in both chambers of the Legislature.

This decision, however, did not end the wrangling over how districts were drawn. In succeeding decades, lawsuits were filed and critics made accusations that districts were being gerrymandered in order to continue dominance of the majority party. In 2000, Arizona voters approved yet another initiative proposition, amending the Constitution to create "an Independent Commission of balanced appointments to oversee the mapping of fair and competitive congressional and legislative districts."[viii]

The five-member commission operates independently of the Legislature and is politically balanced with two Democrats, two Republicans, and one Independent. The majority and minority party leaders in the Arizona House and Senate make the appointments, with those four appointees choosing a fifth member, a registered Independent, to be chairman. Using its own staff, the commission draws the district maps using a set of objective standards outlined in the Constitution.

Districts are to contain roughly equal population numbers for both congressional and legislative districts and are to be as compact as possible, to respect "communities of interest," and use geographic features, existing city and county boundaries and undivided census tracts as much as possible.

The commission is instructed, "to the extent practicable," to create politically competitive districts, provided doing so does not conflict with the other goals. A frequent criticism of legislative districts is that they are not politically competitive, that there are a high number of "safe" districts, whether for Democratic or Republican candidates, and that only a few districts can be considered truly competitive.

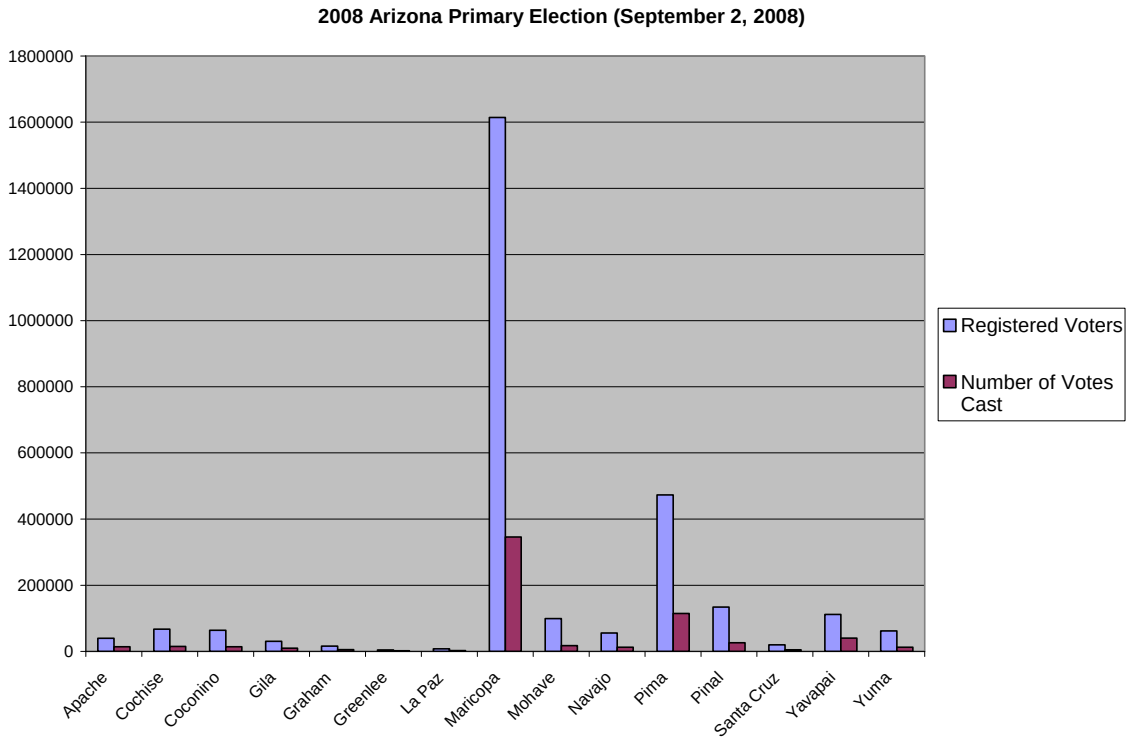
The Citizens Clean Elections Commission states that 21 of the state's 30 legislative districts are "one party dominant,"[ix] defined in statute as "a district in which the number of registered voters registered in the party with the highest number of registered voters exceeds the number of registered voters registered to each of the other parties by an amount at least as high as 10% of the total number of voters registered in the district."[x] A recent article in the *Arizona Republic* reported that "since May 2002, when the political boundaries were redrawn, incumbents from both parties have won all 77 state Senate races in which they ran."[xi]

Complicating this situation is the increasing number of voters who do not claim membership in either major political party, the so-called "Independents." Non-affiliated voters now make up close to one-third of the state's registered voters: 915,981 out of the 3.1 million. Republicans are at 1.13 million and Democrats number 1.04 million. In 1998, voters approved a proposition allowing Independents to vote in a party primary of their choice;[xii] they must request a ballot of one of the political parties in order to do so.

The chairman of the Arizona Independent Redistricting Commission recently said many independents are unaware they can request a partisan ballot and vote in the primary.[xiii] Given the fact that independent registration numbers are expected to surpass both the Democratic and Republican party registration figures by 2016, their influence could be significant in selecting the major party candidates for the general election if they were to turn out in large numbers.

In the 2008 Arizona Primary Election, fewer than 23% of all registered voters cast ballots statewide (Figure 1.1).[2] The highest participation rate was in Greenlee County, with 39.2% of voters turning out (but only 1,648 out of 4,197 registered), and the lowest turnout was in Mohave County with 18% of registered voters casting ballots. Maricopa County, with the highest number of registered voters, had a turnout of 21.4%. Even at that rate, Maricopa County alone accounted for more than half of all the ballots cast in the entire state—more than 54%.[xiv]

[2] The turnout was slightly over 51% for the separate February 8 Presidential Preference election.



An increasing number of voters are choosing early ballots in the mail rather than going to the polls on Election Day. In 2008, only about one-quarter of voters cast ballots at polling places, down from 50% just a few years earlier.[xv] Some have suggested that conducting all elections by mail would increase the likelihood of voter turnout. In 1998, Oregon became the first—and so far only—state to institute all-mail ballots for every election. Analysis suggests voter participation has generally increased as a result.[xvi]

Among other possible electoral reforms are California's new "top two" primary election, which is being used for the first time in 2010, and "range voting," in which voters rate candidates on a 1–10 scale, a system advanced by economist Kenneth Arrow. He argues that different electoral system designs produce different results that may or may not reflect the true preference of voters.[xvii]

The Legislative Agenda

After 98 years of state legislation, nearly every possible topic has been the subject of a bill enacted into law. Today, the Arizona Revised Statutes are contained in 50 volumes covering thousands of pages. In that same time period, the Arizona Constitution has been amended some 200 times[xviii] (the U.S. Constitution has been amended only 27 times). Yet, each year there are hundreds of bills introduced on a wide variety of topics in addition to the constitutionally required bills that are intended to produce a balanced state budget.[xix]

Today, virtually all bills are simply amending existing statutes or adding new sections to topics already present. Bills are requested by any number of special interest groups

representing a wide spectrum of political, business, financial, and community entities. In many cases, groups that are engaged in the process of fundraising request legislation favorable to their business interests—homebuilders, contractors, realtors, bankers, environmental advocates, insurance companies, etc., but other groups that do not make financial contributions also request legislation—cities, counties, school districts, and advocates for social causes such as domestic violence, drunk driving, and human rights.

Simply being identified as a special interest group does not necessarily make one's cause honorable or dishonorable. However, many bills are introduced that do exempt certain businesses or industries from various kinds of regulation or taxation. These are frequently defined as "pro-business" or "economic development" bills, even though they have the effect of increasing profits or shifting a tax burden to private citizens who are not represented at the Capitol by lobbyists who have close relationships with powerful legislators.

Whether from liberal or conservative causes or organizations, private or public interest groups, intentionally or not, nearly all legislation in some way picks winners and losers. As John F. Kennedy said, "To govern is to choose,"[xx] and as in any aspect of American society, those with the greatest level of financial resources or interest in legislation tend to have the greatest access to legislative policy makers and frequently are the beneficiaries of legislation that they support.

Increased Political Polarization?

In districts where one political party holds a substantial majority (more than 50% with the remaining registration split between the second party and independents), critics often allege that the "real" election occurs in the primary, when partisan voters select the candidate that is virtually guaranteed victory in the general election simply by virtue of the registration numbers. While this situation is true more often than not, it is not necessarily always due to registration numbers, but rather to which types of voters tend to cast ballots in the primary election.[xxi]

There is a widespread, but not universal, belief that citizens who are more politically active and more ideologically driven—on both the left and the right—tend to vote in larger numbers in primary elections.[xxii] This trend, coupled with the availability of campaign cash through the Clean Elections system, which enables marginal candidates to run campaigns comparable to more mainstream candidates, may have contributed to the increased polarization of the Legislature in recent years. In Arizona and across the country, a number of political observers have opined that the collegiality and respect that used to exist after hours among political rivals has virtually disappeared. Members of the other political party are no longer seen as well-intentioned individuals who happen to have a different perspective on the issues; they often times are seen as enemies whose point of view and interests must be crushed.

In recent years, only a small number of members of the majority party of each chamber have been considered moderate or "swing" voters on various issues. In recent elections,

some of these members, such as Republican Sens. Tom O'Halleran and Pete Hershberger have been challenged in their respective primaries and have been defeated by more conservative candidates.

Whether friendly rivalry and collegiality is an idealized view of the past or not, it is exemplified by a story told by Chris Mathews, host of MSNBC's "Hardball" program and a former aide to House Speaker Tip O'Neill, about an encounter with his political rival, President Ronald Reagan. As Reagan prepared to deliver a State of the Union address, he stopped off in the speaker's room just off the House floor. Mathews jokingly said, "Mr. President, this is the place where we plot against you." "Not after six!" replied Reagan. "The speaker says that here in Washington, we're all friends after six o'clock."[xxiii]

Proposed Reforms

In order to change the perception that the members of the Legislature do not reflect the beliefs and values of Arizonans as a whole,[3] a number of structural reforms are being discussed by a variety of "good government" groups. Whether they will be adopted or not—or whether they would bring about the changes sought—is unknown. Yet there continues to be frustration with the status quo in the state Legislature, and new ideas continue to be discussed. Since the Legislature itself would have to approve any legislation or make ballot referrals, it is unlikely anything that substantially upsets the current structure will emerge from that body. The challenge is just as great for citizen initiatives, which are difficult and very expensive to get on the ballot. Virtually all initiatives today require the use of paid signature gatherers in order to meet the valid signature threshold.

Notwithstanding these institutional hurdles, here are some of the issues being suggested for legislative reform:

- Repeal or modify term limits. Proposals include complete elimination of term limits or changes to the length of service.
- Repeal the Clean Elections Act. Return to the system in which all candidates had to raise their own funds to run an election.
- Institute all-mail elections. While a substantial number of Arizona voters are already registered for early ballots by mail, this proposal would make Arizona reflect the Oregon law in which elections are by mail-in ballot exclusively. The thinking is that voter turnout would increase if people could vote at home at their convenience rather than having to go to a polling place on Election Day.
- Establish a full-time Legislature. As the state's population is well above 6 million and the issues are highly complex, some believe a full-time legislature with members paid a competitive salary, would attract a broader range of qualified candidates. There are currently 10 states with a full-time legislature, defined as

[3] As an example, it took the legislature nearly a year of discussion to refer a ballot measure to temporarily increase the sales tax rate by one-cent to help offset the state budget deficit. Despite predictions by many members that the voters would never voluntarily increase taxes, the measure was approved 64% to 36%.

requiring 80% of the time for a full-time job.[xxiv] Whether these legislatures actually attract more qualified candidates or not is a highly subjective question.

- Create a non-partisan and/or unicameral legislature. Currently only the state of Nebraska has a non-partisan, unicameral legislature, something that took decades to develop.[xxv] Some people believe the elimination of party affiliation would reduce the level of bickering and improve the collaborative lawmaking process. Others disagree, saying a unicameral body eliminates the check and balance of the sister chamber, and that even without party labels, members' political affiliations are still well known.
- Use a top-two runoff. This change would require all candidates to run in a single unified primary election and, if no candidate received 50% plus one, the top two vote-getters, regardless of party affiliation, would face each other in a runoff at the general election. Advocates of this system think it would decrease the number of highly partisan or extreme candidates that can currently be elected by a minority of voters in a party primary election. In June 2010, California voters approved a ballot proposition creating such a system in that state, eliminating the separate party primaries.

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[i] Arizona Constitution, Article IV
[ii] Arizona Constitution, Article IV, Part 1 Section 1
[iii] 1998 Proposition 105, amending Arizona Constitution, Article IV, Part 1, Section 1, Subsection 6
[iv] A.R.S. § 16-322.
[vv] Arizona Constitution, Article V, Section 12.
[vi] 1998 Proposition 200, Citizens Clean Elections Act. ARS, Title 16, Chapter 6, Article 2.
[vii] 250 F.Supp. 537, 541 (D.C.Ariz.1966)
[viii]2000 Proposition 106, amending Arizona Constitution, Article 4, Part 2 Section 1.
[ix] Arizona Clean Elections Commission, "One Party Dominant Districts"
[x] ARS § 16-952(D)
[xi] The Arizona Republic, July 8, 2010, "Analysis: Arizona's political redistricting fails to meet goals"
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Chapter 4

Arizona's Executive Branch: The Plural Executive and the Governor as "First Among Equals"

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Key Points

- The Arizona office of the executive has eleven elected officials; governor, secretary of state, treasurer, attorney general, superintendent of public instruction, mine inspector, and five corporation commissioners
- Each office is elected differently and therefore can influence and involve the citizenry differently
- Every executive office has a varying level of authority, visible or not, and with this authority there can be strong offices, attorney general, or relatively weak offices, mine inspector, which can politicize these offices
- The governor is a powerful executive, these powers extend to calling special session (for example the budget sessions last year), introducing legislation and line-item veto

The institutional conflict between Arizona's legislative, executive, and judicial branches can be traced back to the constitution that was formed when Arizona became a state in 1912. The document also dispersed power within the executive branch.

The framers of the constitution established a "plural executive system" by providing for the direct election of multiple executive officials. The governor was but one these and had no formal control over the others. Subsequent Legislatures compounded the problem of executive leadership by regularly creating more agencies and administrative positions that were beyond the governor's direct supervision or power of appointment or removal.

Throughout the years, the governor's office has been strengthened to the point where it can be said that the governor is a "first among equals." Still, there are basic legal constraints on the office that dictate and sometimes interfere with the ability of governors to manage state affairs and exert policy leadership.

The original constitution called for the separate election of the governor, secretary of state, auditor, treasurer, attorney general, superintendent of public instruction, mine inspector, and a three-member corporation commission to regulate the rates and operation of public utilities. The first Legislature added a tax commission of three members. By the end of the first legislative session, the list of independently elected executives totaled 13.

The state continues to have a plural executive, though it has shrunk with the elimination of the elected office of auditor and the tax commission.[1] Hoping to end several years of political infighting and turmoil, voters sanctioned the addition of two more corporation commissioners in 2000, bringing the total to five.

Defenders of the plural executive system have based part of their argument on the simple belief that the people should and can directly rule and that, in this case, democracy depends not only on how many people can vote but also on how many offices they can vote for. They assume that voters are capable, at least over time, of making sound decisions on these offices.

Arizona Governor Ernest McFarland argued in the 1950s that people "are just as capable of electing other officials as they are of electing a governor" and "while the people at times do make mistakes, they will, in time, correct them."[i] Defenders of the plural executive have also argued that it is unwise to concentrate all executive authority in a single office, because to do so is to invite corruption and the abuse of power. Far better, they contend, is a system in which several independently elected officials watch and check each other.

Along with a general defense of the plural executive system, special arguments have been advanced for the retention of specific elected offices and agencies. For the mine inspector and the corporation commission, the argument has long been made that direct election is the best way to safeguard against the agencies being unethically influenced by the companies they are supposed to regulate. The fact that the corporation commission performs certain judicial-like functions also is commonly cited as a need for retaining its independence from the governor.

Plural executive critics argue that the system fragments the management of the state's affairs, hinders overall efficiency, invites rivalries and friction among executive officials (especially when they represent different political parties), creates a long ballot where voters are asked to pass judgment on candidates they know little about, calls for the election of people whose duties are essentially ministerial rather than policy-making (though candidates often disguise this by promising to do things that have little or nothing to do with the responsibilities of the office they are seeking) and may well result in the election of unqualified people (they have electability but lack the necessary training or experience to actually do the job). Proponents of substituting gubernatorial appointment for election argue that the governor, as an agent of the people, can do a better job than the people can do for themselves in choosing qualified officials.

Some of the elected offices are small and vest the elected head with little or no policymaking authority. They are more administrative in nature. This can be said about the positions of secretary of state, state treasurer, and state mining inspector (the only elected mining inspector in the nation). The attorney general, on the other hand, has had enough authority, visibility, and, often, enough support in the public to be an independent force in state politics, sometimes to the distress of the governor and state legislators. The independently elected superintendent of public

[1] The auditor was essentially a bookkeeper and an accounts payable clerk for the state.
The functions of the office were shifted with voter approval in 1968 to the governor as part of the effort begun earlier in the decade to strengthen the office of governor in regard to financial management. Voters approved by a vote of 206,432 to 171,474. The Tax Commission's functions were taken over by the Department of Revenue and formally ceased operations on January 1, 1979.

instruction often is an agenda builder on educational issues, but his or her official duties center on managing the Department of Education. The corporation commission is an important and powerful independent body. Arizona, though, is one of only 13 states with elected commissioners. In most states, comparable public service or public utility commissions are appointed by the governor.[2]

Some have complained that the state has too many elected officials, suggesting that the governor or Legislature should appoint heads of various elected offices and bodies. A series of articles in the *Arizona Republic* in 2006 focused on the need to make the positions of mine inspector and state treasurer appointive by either the Legislature or the governor.[ii] Survey research conducted at the time indicated that less than 7% of the public knew the mine inspector office even existed. In 2009, a reform group headed by retired U.S. Supreme Court Justice Sandra Day O'Connor called for making the positions of mine inspector, treasurer, and the superintendent of public instruction appointive rather than elective.

These proposals stalled in the past, and stalled again in November 2010 when voters turned down Proposition 111. Proposition 111 would have renamed the office of secretary of state the office of lieutenant governor. The measure would have also placed the lieutenant governor on the same ticket as the governor, the same way the U.S. president and vice-president are elected. Under the failed Proposition 111, candidates for lieutenant governor would run independently of gubernatorial candidates in party primaries, but the winning candidates for the two positions would run on a single ticket in the general election.[3] The lieutenant governor would become governor should a vacancy occur in that office.

Under current Arizona law, adopted by constitutional amendment in 1948, if the governor's office is vacated because of death, incapacitation, resignation, impeachment, recall, or any other reason, the secretary of state is the first in line, followed by the attorney general, state treasurer and superintendent of public instruction, in that order. Succession has been a recurring event in Arizona. Since statehood five secretaries of state have become governor because of a vacancy, and on two occasions the secretary of state entering office was of a different political party than the governor being replaced. In 1988, Democrat Rose Mofford replaced Republican Evan Mecham, who was impeached and ousted from office by the Legislature. In 2009, Republican Jan Brewer replaced Democrat Janet Napolitano, who resigned to accept a position in the Obama administration.[4]

Given the proximity to the governor's office through the line of succession, "lieutenant governor" is a more appropriate title than "secretary of state" for the office. The proposed Proposition 111 also had value in eliminating the possibility of a change in party control through

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[2] Arizona voters in 1968 rejected a ballot measure empowering the governor to appoint corporation commission members by a vote of 210,862 to 179,676.

[3] In 24 of the 43 states with a lieutenant governor, this official and governor run on the same ticket. In eight of these, candidates for governor and lieutenant governor run together in both the primary and general election. In sixteen other states, they run together only in the general election. Candidates for governor and lieutenant governor in the remaining nineteen states are elected on separate ballots.

[4] Those in line to become governor must be holding the office by virtue of an election. In 1978 the governorship passed on to Bruce Babbitt who had been elected Attorney General after the death of Governor Wesley Bolin because the secretary of state at the time, Ross Mofford, had been appointed to the position of secretary of state.)

succession to the first in line, thus easing the transition period and helping to ensure policy continuity.

Under the proposal, Arizona would have joined Hawaii and Utah as states with a lieutenant governor elected with the governor who serves as the state's chief election officer. Critics, however, were concerned that by having an ally in the lieutenant governor's office in charge of what the independently elected secretary of state once handled would give the governors an enhanced and hard to resist opportunity to influence decisions regarding voting and elections in their own or their political party's interest. Other states have found other less politically charged tasks for the lieutenant governor, e.g., working on economic development. Critics of the proposal also contended that the essentially ministerial duties of the secretary of state office are not of much value as a training ground for the governor's job.

Partially because of the plural executive system, the office of governor is weak compared to the president of the United States when it comes to administering laws. Departments with elected heads are beyond the governor's reach. Beyond this though, the governor has only limited authority to appoint, supervise or remove administrators or to manage fiscal affairs. In several situations, the governor's appointment power is shared with a board, commission, or the Legislature, whose confirmation is required.

Often, administrators have terms longer than those of the governor, making it difficult for the governor to remove them from office. To remove officials from various independent boards and commissions prior to the expiration of their terms, the governor must establish wrongdoing or malfeasance in office. It is not enough that the appointee disagrees with the governor on matters of policy.

When it comes to budgeting, a significant breakthrough for the governor came in 1966, when Arizona became the last state in the union to adopt an executive budget. With that, the governor gained the authority to review department budgets, integrate their spending requests into a single document, and submit that document to the Legislature. Up to the mid-1960s, the governor's budget amounted to little more than a compilation of information supplied by administrative agencies.

The executive budgeting system improved the governor's ability to control the spending of administrative agencies and provide overall management. In 1966, however, the Legislature partially offset the increase in the governor's budget-making role and kept its own influence intact by creating a legislative budget office. Since that time it has effectively used a Joint Legislative Budget Committee, which has its own permanent staff to do independent research, analyze the governor's budget requests, and prepare alternative budgets for each agency.

The Legislature has unlimited power to change the governor's budget requests and, in practice, has seldom passed up the opportunity to alter the governor's proposals. The governor's ability to control agency spending is limited by the fact much of the budget is legally mandated rather than discretionary spending. Such mandatory spending is often formula-driven, or determined by the number of people eligible for certain services.

In terms of legislation, Arizona governors, like those in other states, have the authority to recommend measures to the Legislature, call special sessions, and veto legislation. The governor outlines his or her legislative program in a "state of the state" message given at the beginning of each legislative session. This message is followed up with specific proposals.

Governors can call special legislative sessions at their discretion. The constitution dictates that during a special session, legislators may only consider those matters the governor specifically identifies. Legislators must leave their homes and jobs to attend the session. Just by threatening a special session, the governor may force action during a regular session. On the other hand, calling a special session may antagonize the legislators, and the governor may face embarrassment if his or her proposals are not accepted.

Legislators can avoid the possibility of a veto by referring a measure directly to the voters. Legislators have regularly referred seven or more measures directly to the voters since 1998.[iii] Otherwise, every bill must go to the governor for approval or rejection.

The veto has been particularly useful to governors confronted with Legislatures dominated by the opposite party. This was true, for example, of Democratic governors Bruce Babbitt and Janet Napolitano; the latter set the record for vetoed bills with 58 in 2005.[iv] A governor's veto can be overridden only by a two-thirds vote of the members in each house—a requirement that makes an override extremely rare. Once legislators realize the governor can use the veto effectively, they are apt to include the governor on early discussion of issues in order to avoid conflict.

Governors in Arizona, like governors in more than 40 other states, have a line-item veto that allows them to strike out particular items in appropriation (spending) bills. The item veto gives the governor greater opportunity to reduce the general level of spending—though governors have also found that it can be used to increase spending beyond what the Legislature intended. Both Governor Napolitano and Governor Brewer have used the item veto to eliminate spending cuts approved by the Legislature, thus increasing overall spending.

The governor's line-item veto has been hindered by the legislative practice of lumping appropriations for programs together on one bill, making it impossible for governors to cut the appropriations for programs he or she dislikes without cutting those he or she supports. However, as with the regular veto, a governor can use the threat of a line-item veto to bargain with legislative leaders or individual legislators.

Term limits also influence the governor's position vis-à-vis the Legislature. Initially the Arizona Constitution granted governors only two-year terms, but placed no restriction on the number of times voters could return a governor to office. In 1968, voters extended the term to four years, giving governors a larger time frame in which to pursue and implement their polices. In 1992, however, Arizona voters opted for a two-term limit for all state officials, including the governor. Under such restrictions, governors can expect to lose a considerable amount of influence as they near the end of their second term. For example, legislators can thwart their policies simply by moving slowly on their requests.

The governor is clearly more than a "first among equals." Positioned at the center of the state system, he or she is the most visible political figure. The governor can lay claim to being chief administrator and chief legislator and other titles such as chief of state, in representing the state on important formal occasions; chief magistrate, in making quasi-judicial decisions on the fate of those accused or convicted of crimes; and as commander in chief in exercising control over the state police and the National Guard, except when the president calls the Guard into the service of the federal government.

Overall, the personal characteristics of governors (their goals, experience, and talents) and the political circumstances in which they find themselves may matter most in determining what they try to accomplish and are able to achieve. Still, the basic conditions of the office set by law can, and in some cases do make it more difficult for them to function effectively in providing leadership.

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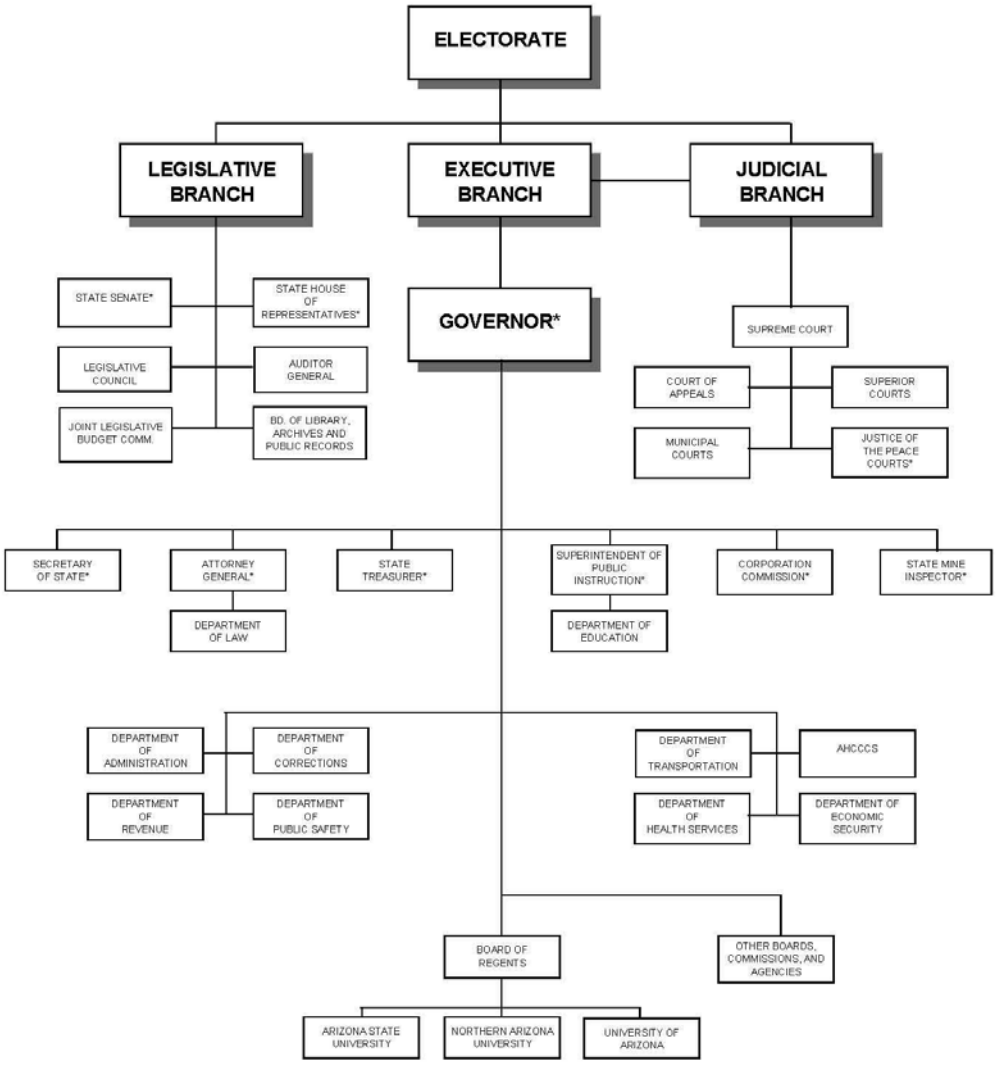
[i] Ernest W. McFarland, Mac: The Autobiography of Ernest W. McFarland (Copyright, Ernest McFarland, 1979), p. 232.
[ii] See for example, "The Issue: In Pursuit of Good Government; End the Fiefdoms in Obscure State Offices," *Arizona Republic* (May 28, 2006): V4.
[iii] *Political 2010 Almanac*, Phoenix, AZ: Arizona Capitol Times, 2010): 69.
[iv] *Political 2010 Almanac*, Phoenix, AZ: Arizona Capitol Times, 2010): 84.

ARIZONA STATE GOVERNMENT ORGANIZATION



* ELECTED OFFICIALS

Chapter 5

Arizona's Judicial Branch of Government

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Key Points

- Provides a brief history of the Arizona Judicial System and how Arizona judges fit into and have influenced the national judicial system
- Gives a description of each level of the courts in Arizona and who is effected by each level
- How to become a merit selected judge and how individuals fit into that process
- What the process is to hold both elected judges and merit selected judges accountable
- What business the courts conduct on a daily basis. Which courts handle which types of cases and how that helps the state generate revenue
- What the courts are doing to prepare and provide for the future. Discussion of the Justice 2020 Strategic Plan and how its five goals impact individuals.
- There are many ways that the courts are preparing for the future including; focusing on the merit system instead of electing judges, how to incorporate new technology into the court system, maintaining accessibility for the diverse population in Arizona, and keeping funding at appropriate levels in order to provide necessary services

Introduction

Arizona's "integrated judicial department," defined in Article VI of the state constitution, consists of a supreme court, an intermediate appellate court, a superior court of general jurisdiction, and limited jurisdiction courts. The constitution assigns to our judiciary the important responsibilities of resolving civil disputes, determining guilt or innocence in criminal matters, and ensuring that government itself complies with the law.

Courts interpret and apply the federal and state constitutions and statutes enacted by the Legislature or approved by the voters. The judiciary is not intended to reflect popular opinion in its decisions, but instead is to fairly and impartially apply the law, even if the result may be unpopular.

In order for courts to fairly and impartially apply the laws, they must be staffed by qualified judges and other personnel and they must be insulated from forces that could improperly influence their decisions. Since statehood, the courts in Arizona have been designed as separate and independent branches of state, county, and city government. Over the state's history, we have amended our constitution to improve the quality and accountability of judges by adopting a merit selection system and procedures to evaluate judicial performance.

The constitution gives the Supreme Court administrative supervision over all the courts of the state. The Supreme Court adopts rules for Arizona courts, regulates the practice of law, and oversees other responsibilities assigned to the judicial branch, such as the probation system.

History

During the last 100 years, many individuals and events have shaped the development of Arizona's judiciary. Some highlights are:

- **December 9, 1910:** The state constitutional convention approves Arizona's constitution, which requires both a popular vote and federal approval to become effective. After vigorous debate, the convention concludes that judges, like other elected public officials, should be subject to recall.
- **February 14, 1912:** Arizona finally achieves statehood. In 1911, President Taft vetoes a statehood bill because he opposes judicial recall. Arizona's voters approve a revised constitution omitting the recall for judges. In the first election after statehood, the voters amend the constitution to restore this provision.[i]
- **1912**: The Arizona Legislature establishes superior, juvenile, and justice of the peace courts. The first Arizona Supreme Court includes Justices Alfred Franklin, Donald Cunningham, and Henry Ross (who became the longest serving justice, completing a 33-year tenure in 1945).
- **1913:** The Arizona Legislature establishes police (municipal) courts for each of the state's incorporated cities and towns.
- **1914:** Nellie T. Bush and Emeline Ferguson are the first women elected as justices of the peace, beginning a long tradition of strong female leadership in Arizona's courts.
- **1953:** The superior court rules that segregation in high schools is unconstitutional.
- **1959:** Raul Castro is elected to the Pima County Superior Court and is the first Hispanic superior court judge. In 1974, he will be elected Arizona's governor.
- **1960:** Voters approve the Modern Courts Amendment, thereby amending Article VI to:
    - Give the Supreme Court administrative supervision over all courts of the state
    - Increase the minimum number of Supreme Court justices from three to five
    - Give the Supreme Court authority to make rules governing all procedural matters in any court
    - Authorize the creation of the court of appeals
    - Require that justices and judges not practice law or hold any other public office or employment during their term of office
    - Require that they hold no office in any political party or campaign in any election other than their own
    - Require that Supreme Court justices, court of appeals judges, and superior court judges retire at age 70
- **1961:** Lorna Lockwood, who had served on the Maricopa County Superior Court, becomes the first woman to serve on Arizona's Supreme Court.
- **1963:** Thomas Tang is elected to the Maricopa County Superior Court. In 1977, Judge Tang will be the first Chinese-American appointed to the federal appellate bench when he is appointed to the Ninth Circuit Court of Appeals.

- **1964:** The Arizona Legislature establishes the Court of Appeals.
- **1965:** Lorna Lockwood becomes the nation's first female state chief justice. Hayzel B. Daniels is appointed to the Phoenix Municipal Court and becomes Arizona's first African-American judge.
- **1970:** Voters establish the Commission on Judicial Qualifications (now called the Commission on Judicial Conduct). The Commission investigates misconduct complaints against judges.
- **1974:** Voters approve merit selection and retention elections for justices, state appellate judges, and superior court judges in Pima and Maricopa counties.
- **1981:** Sandra Day O'Connor is the first woman appointed to the U.S. Supreme Court. A proponent of merit selection, she had been elected as a superior court judge in 1974 and appointed to the Arizona Court of Appeals in 1979.
- **1990:** Arizona Courts Building is completed.
- **1992:** Voters approve Proposition 109, an amendment to the constitution that revises the merit selection process to increase the public's role and establishes a process for evaluating judicial performance.
- **2005:** Roxanne Song Ong becomes the first Asian-American woman to preside over the Phoenix Municipal Court—one of highest volume courts in the United States.

The Supreme Court

The Arizona Constitution now stipulates that the Supreme Court shall consist of not less than five judges serving six-year terms. Before the 1960 Modern Courts Amendment, three justices served on court. Since 1961, Arizona statutes have specified that the court shall consist of five justices.

The Supreme Court has discretionary jurisdiction for appeals from the two divisions of the Arizona Court of Appeals; that is, the Supreme Court may agree, in its discretion, to review a case when requested by one of the parties. The Supreme Court also has mandatory appellate jurisdiction in cases involving the death penalty and certain election-related matters, and it has original jurisdiction in disputes between counties.

The Supreme Court has administrative supervision over all courts of the state and has the power to make procedural rules related to all courts. The Supreme Court also disciplines judges and regulates the state bar, including the admission and discipline of attorneys.

Court of Appeals

To accommodate increasing case loads, the 1960 Modern Courts Amendment authorized the Legislature to create an intermediate appellate court. In 1964, the Legislature created a court of appeals. This court hears appeals from the superior court, the tax court, and the industrial commission and appeals in unemployment compensation cases. The court of appeals is divided into two divisions by statute. Division One consists of a chief judge and 15 other judges who hear cases in three-judge panels in Phoenix. Division One serves Maricopa, Yuma, La Paz, Mohave, Coconino, Yavapai, Navajo, and Apache Counties. Division Two consists of a chief judge and four other judges who hear cases in three-judge panels in Tucson. Division Two serves

Pima, Pinal, Cochise, Santa Cruz, Greenlee, Graham, and Gila Counties. Court of appeals judges serve six-year terms.

Superior Court

The superior court is Arizona's general jurisdiction trial court. Thus, the superior court has original jurisdiction over all cases in which exclusive jurisdiction is not vested by law in another court, including cases of equity and law relating to title of real property, probate, family law, felonies, and other matters. Superior courts also have appellate jurisdiction in cases arising from limited jurisdiction courts. The Superior Court consists of 175 judges who are at least 30 years old, of good moral character, admitted to the practice of law in Arizona, and a resident of Arizona for the five years immediately before taking office. The Arizona Constitution requires judges to rule promptly: "Every matter submitted to a judge of the superior court for his decision shall be decided within sixty days from the date of submission thereof."[ii]

Limited Jurisdiction Courts

Arizona's limited jurisdiction courts include justice of the peace and city or municipal courts. These judges hear the vast majority (93%) of the nearly 3 million cases annually processed in the state court system. In 2009, Arizona courts resolved approximately 520,000 criminal cases, 392,000 civil cases, 1.9 million traffic cases, and 130,000 other cases. Municipal courts resolved approximately 1.7 million cases; justice courts nearly 1 million; superior courts 235,000; the court of appeals 3,600; and the Supreme Court just over 1,000.

The Arizona Constitution creates justice of the peace and other courts "inferior to the superior court." Currently 87 elected justices of the peace serve in statutorily created precincts throughout Arizona. Justices of the peace are not required to be trained in the law. These judges preside over civil cases—including evictions—where the amount in controversy is $10,000 or less, civil and criminal traffic matters, felony initial proceedings, preliminary hearings, and criminal misdemeanors where the punishment does not exceed a fine of $2,500 or six months' imprisonment. Justice courts also include a small claims division for civil matters involving $2,500 or less. Volunteer hearing officers often preside over these small claims matters and attorneys can appear only if the parties agree in writing.

Arizona law requires all incorporated cities or towns to establish a municipal court or to contract with the local justice court to hear cases in the municipality. Approximately 154 judges serve in more than 80 municipal courts around the state. Municipal courts share concurrent jurisdiction with justice courts except for civil disputes. In some rural communities, the municipal and justice courts are consolidated. Municipal judges are appointed for a minimum of two-year terms, except in Yuma where they are elected.

Accountability - Judicial Selection and Performance Review

Arguably no other public officials are subject to the same degree of accountability as judges. Elected judges obviously stand before the voters to obtain or keep their office. Merit-selected

judges are subject to periodic public performance review and retention elections. All Arizona judges are subject to discipline under the authority of the Commission on Judicial Conduct.

Supreme Court justices, court of appeals judges, and some superior court judges are selected by a merit system. As first adopted, the merit system applied to superior court judges only in counties with 150,000 or more people, which then comprised Maricopa and Pima Counties. In 1992, voters increased the population threshold to 250,000. After the 2010 census, Pinal County is expected to implement merit selection for its superior court judges. The constitution allows the voters of a county, regardless of population, to approve the use of merit selection, but currently all counties other than Maricopa and Pima elect their superior court judges.

Under the merit selection system, persons who desire to become judges submit applications to a nominating commission that is comprised of 10 non-lawyers and 5 lawyers. Separate commissions exist for the Appellate Courts, the Maricopa County Superior Court, and the Pima County Superior Court. The chief justice, or her designee, chairs the commissions but generally does not vote unless it is necessary to resolve a tie. The applications are made public, and each commission, after soliciting public comment, identifies certain candidates to interview. These interviews are also conducted in public, as are most of the commissions' deliberations. Ultimately, a commission will send the governor a list of at least three nominees for each judicial vacancy. The governor must make his or her appointment from the list of nominees.

The 1992 amendments also required the creation of a process for evaluating the performance of judges appointed under merit selection. This process, administered by the Arizona Commission on Judicial Performance Review, includes surveys from jurors, witnesses, litigants, administrative staff, and attorneys who have interacted with the judge in a judicial or administrative setting. The public also provides input through written comments and public hearings. The commission distributes summaries of the performance reports to the public before each general election.

Commission on Judicial Conduct

In 1970, Arizona voters approved a new Article VI.I, creating the Commission on Judicial Conduct. The 11 commission members include 6 judges appointed by the Supreme Court, 2 lawyers appointed by the State Bar of Arizona, and 3 citizens who are neither lawyers nor judges appointed by the governor. Since 2006, the commission has posted resolved complaints and related disciplinary orders on its website. On the commission's recommendation, the Supreme Court may suspend or remove a judge for misconduct. Apart from the provisions of Article VI.I, the constitution also authorizes the removal of judges by impeachment or recall.

The Business of the Courts

The Arizona Constitution provides that the "supreme court shall appoint an administrative director and staff to serve at its pleasure to assist the chief justice in discharging his administrative duties."[iii]. The Administrative Office of the Courts consists of eight divisions and manages the work of the judicial branch throughout the state.

The Arizona court system employs more than 10,700 staff in 200 facilities around the state. The courts handle nearly 3 million cases annually—an average of 11,647 filed every working day.

In fiscal year 2009, the courts' statewide revenue totaled $409.3 million, largely through the collection of fees, fines, or other penalties. Municipal courts generated 47% of the total revenue; justice courts, 29%; superior courts, 23%; and appellate courts, a little more than 1%. Of the total court system revenue, the state received 44%, counties received 30%, and cities and towns 26%.

During fiscal year 2009, the courts expended $740.7 million. Courts are funded through several sources: county – 64%, state – 21%, municipal – 14%, and federal/private – 1%.

The judicial branch receives only 1.4% or ($120 million) of the state's general fund budget. Overall state funding for the courts is just $168 million.

The judicial branch also provides probation services throughout the state. Through probation services, the judiciary monitors some 85,000 adults and 11,000 juveniles and also manages 14 juvenile detention centers.

Administrative Oversight of the Courts

With the goal of improving judicial administration, the Arizona Judicial Council (AJC) helps oversee the judicial branch. The AJC consists of 25 members including judges, attorneys, and 9 public members. The AJC assists the Supreme Court and the chief justice in developing and implementing court policies and procedures, maintaining uniformity in court operations, and coordinating court services. The AJC also oversees the work of seven committees focusing on various courts and separate commissions on minorities, victims, and technology.

Strategic Agenda – Justice 2020

The AJC adopted the courts' strategic plan, *Justice 2020, A Vision for the Future of the Arizona Judicial Branch,* on December 16, 2009. The plan is available online at http://www.azcourts.gov/LinkClick.aspx?fileticket=esO0WyCB7L0%3d&tabid=942.

In the strategic plan, Supreme Court Chief Justice Rebecca White Berch explains that

> "While our justice system undoubtedly looked quite different a century ago, the Arizona Supreme Court's essential vision remains unchanged: to provide the people of Arizona with a court system that fairly and impartially administers justice and efficiently resolves disputes. Courts must ensure that the rule of law protects the rights of all."

Goal one of the strategic plan focuses on using technology effectively, simplifying and enhancing the legal and judicial system, and improving public access, transparency, and accountability. Specifically, "the objective is not simply to adopt new technology for its own sake, but to solve business-process problems, provide prompt, reliable information to decision

makers, and improve service to the public." To improve public access, case information and documents must be readily available electronically. Simplifying court rules and streamlining case management should increase access and public trust and confidence in the judicial system. Goal two of the strategic plan stresses the importance of maintaining a professional workforce and improving operational efficiencies. The plan states, "The Judicial Branch must continue the professional development of judges and court employees to ensure that they adhere to the highest standards of competence, conduct, and accountability." In order to remain free of political influence, the courts must have a consistent and reliable source of funding. While case filings increase, resources diminish. This conundrum challenges the courts' ability to perform statutory and constitutional duties.

Goal three of the plan explains the benefits of improving communication with the public, other branches of government, and justice system partners. "In every circumstance, success depends upon timely communication of clear, concise information," the plan says. The courts are developing and deploying a communication strategy that enhances online resources such as web pages and social networking tools.

Goal four outlines the courts' plans to protect vulnerable children, families, and communities. The courts must consider the rights of parents and the safety and well-being of children. Furthermore, with significant increases in Arizona's aging population, the courts must hold fiduciaries accountable to protect seniors from fraud. In addition, the plan states that "holding those convicted of crimes accountable and reducing their likelihood of re-offending are central to protecting Arizona's communities." The plant calls for the courts to "provide a balanced approach to probation that holds probationers accountable, keeps our communities safe, and provides treatment and rehabilitative services to offenders."

Goal five sets forth the courts' plan to improve the state's legal profession. Currently the State Bar of Arizona includes almost 20,000 active and inactive attorneys. In regulating the practice of law, the Supreme Court seeks to protect the public by requiring Arizona attorneys to meet the highest standards of professionalism and ethical conduct.

The courts and the bar have improved the attorney discipline system in an effort to maintain a fair and impartial discipline system, while decreasing the time and cost to process discipline cases. The Supreme Court also establishes qualifications for admission to practice law in Arizona. Recently, the court ushered in a new process allowing "admission on motion" for attorneys who meet Arizona character and fitness standards and are licensed in other states that parallel Arizona's admission requirements and allow reciprocal admission. The court is also considering the use of a national uniform bar examination, which could reduce the costs and other burdens on applicants seeking admission to practice.

Future Trends

Future Trends in State Courts 2010, a report prepared by the National Center for State Courts (NCSC), identifies challenges confronting courts nationwide and practices that could improve court operations. The report includes articles by many knowledgeable and distinguished commentators.

Justice Sandra Day O'Connor emphasizes the importance of judicial independence in her article, "Importance of Civic Partnership: How Our Courts Can Help Maximize State Court Civics Education Initiatives." She notes:

> "Judicial independence is critical to our American democratic system of checks and balances. The courts must be insulated from political influences so that they can apply the law fairly and without intimidation by other parts of the government or majority whims. The threat to judicial independence is particularly acute for state judges, who do not enjoy constitutional guarantees for job security or level of remuneration and who are more vulnerable to political forces."

Justice O'Connor believes that increasing public awareness of the separation of powers protects judicial independence. In her NCSC article, Justice O'Connor explains that the Conference of Chief Justices and Conference of State Court Administrators each concluded, "Civic engagement is essential to maintaining our representative democracy" and encouraged states to "strengthen and revitalize civics education." To that end, Justice O'Connor's online "Our Courts Project" (www.ourcourts.org) features online games, videos, and lesson plans. She concludes, "Only a citizenry knowledgeable about civics and government can appreciate that courts must be independent from the political branches of government, and that judges have a unique role requiring them to be unresponsive to political or personal biases."

We need to preserve and improve the state's judicial merit selection system and the courts' judicial education program, which have combined to give Arizona a court system that is widely praised by litigants and lawyers in Arizona and other observers nationally.

Last year, Justice O'Connor told the Economic Club of Phoenix that "If I could do one thing to protect judicial independence in this country, it would be to convince those states that still elect their judges to adopt a merit selection system and—short of that—at least do something to remove the vast sums of money being collected by judicial candidates, usually from litigants who appear before them in the courtroom."

Arizona courts are committed to "continue the professional development of judges and court employees to ensure that they adhere to the highest standards of competence, conduct, integrity, professionalism, and accountability."[iv]

Evolving technology is another ongoing challenge facing Arizona's courts. To adapt to these changes, courts will need the leadership and resources to modernize procedures and practices ranging from case filing (the courts are working to implement an electronic case filing system statewide) to courtroom construction. In light of technological change, NCJS President Mary Campbell McQueen warns, "reengineering is essential for the long-term health of the court system."

Arizona courts will also need to remain accessible to the state's diverse population. The courts are committed "to serve the growing number of non-English speaking members of the public, information about court processes and procedures must be provided in languages other than

English, and the number of available, qualified interpreters must be increased."[v] In addition, the courts will work to "expand cultural awareness and sensitivity training for judges, court staff, probation officers, and volunteers."[vi]

Finally, as the economic recession continues to adversely impact Arizona courts, a stable source of funding becomes more imperative. In a 2009 report, *How Courts are Weathering the Economic Storm*, the NCSC warned that reduced resources may result in difficulty filling judicial vacancies, furloughing or reducing staff, reducing hours of operation (several Arizona courts already close on Fridays), increasing court fees, increasing case backlogs, and restricting successful problem-solving courts.

Arizona courts must receive adequate funding in order to afford access to justice and to protect the public. Well-funded courts also make good fiscal sense: effective probation services can avoid unnecessary spending on incarceration, and efficient collection of fines and penalties can generate substantial revenues for state and local governments. Finally, funding is necessary to allow investments in technology that can significantly reduce costs over time for both courts and litigants.

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[i] John D. Leshy, *The Making of the Arizona Constitution*, 20 Ariz. St. L.J. 1, 56-58 (1988).
[ii] Article VI, Section 21
[iii] Article VI, Section 7
[iv] *Justice 2020*, Goal 2
[v] *Justice 2020*, Goal 1
[vi] *Justice 2020*, Goal 2

Chapter 6

Intergovernmental Relations: The State And Local Governments

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Key Points

- Arizona's political system is a mixture of many governments where political power is both diffused and shared but legally, state government supersedes county and local government.
- Municipalities have more flexibility than counties because counties are directly controlled by the state legislature.
- The debate about where to draw the line regarding state authority over counties and municipalities embodies the push-pull of state-local relations but Arizona courts generally limit local power and authority.
- Counties, cities, and towns have created statewide voluntary organizations to represent their interests at the state Legislature, the executive, and the judiciary.
- Fiscal issues that relate to the allocation of public resources are at the core of intergovernmental relations in Arizona. The intergovernmental relations picture is clarified by examining total public spending in Arizona, and by looking at which government branches increases spending and receive benefits.
- Counties, cities, and towns are not just partners with the state in providing services, but play the dominant role.

The Compound Republic

Arizona's political system is a mixture of many governments where political power is both diffused and shared. This system is dominated by one state government with separation of powers that constitutionally and statutorily authorizes and guides the creation and governance of other government units. Counties, cities, towns, school districts, community college districts, and special districts—each with its own locally elected governing body with legal and fiduciary responsibility—are all interwoven with the state and give Arizona's political system richness and complexity.

In addition, Arizona is home to 21 sovereign Indian nations whose governing bodies are also democratically elected and who pursue decisions and policies with other levels of government that will benefit and safeguard their sovereignty. The federal government plays a significant role in Arizona's political system as well, determined in large part by regulations and intergovernmental revenue transfers.

Decisions and actions of these governments ultimately direct the allocation of public resources and political power, and understanding the institutions that shape these relationships is helpful. James Madison once recognized the various influences on governance that the many levels exert in a democratic system and called it the "compound republic."

The various levels of the compound republic—federal, state, local, and tribal—are tied together by a multitude of factors: regulations, statutes, money, programs, political parties, political districts, and the play of interest groups among them. Interest groups in particular have a role in moving policy issues up and down through the system.

Other entities and organizations exerting influence on the compound republic—but that don't have publicly elected governing structures—include regional associations of governments (whose boards comprise an elected official from each jurisdiction and tribe in the county), non-governmental organizations that provide public services, colonias, community councils that represent unincorporated areas in counties, and homeowner and neighborhood associations.[1]

This intergovernmental system is similar to those of other states, although Arizona's number of local governments—655—is comparatively small. The average number of intergovernmental units per state is 1,611 and the average number of Indian tribes is 11. Table 1.1 presents the units of government in Arizona by county.

Table 1.1: Units of Government by County

County Name	Cities & Towns	Tribal Governments[2]	Community College Districts[3]	School Districts	Special Districts	Total Units
Apache	3	1	0	10	12	26
Cochise	7	0	1	22	20	50
Coconino	6	3	1	8	22	40
Gila	5	1	1	8	1	16
Graham	3	1	1	8	6	19
Greenlee	2	0	0	4	2	8
La Paz	2	1	0.5	6	10	19.5
Maricopa	24	2	1	55	74.3	156.33
Mohave	4	2	1	13	19	39
Navajo	6	2	1	14	33	56
Pima	5	2	1	16	23.3	47.33
Pinal	10	2	1	18	43.3	74.33
Santa Cruz	2	0	1	7	1	11
Yavapai	8	2	1	20	33	64
Yuma	4	2	0.5	9	13	28.5
Total=15	91	21	12	218	312	655

[1] Tanis J. Salant, "The Compound State," *Pieces of Power: Governance in* Arizona, Arizona Town Hall Report, October 2001, p. 130. Arizona's compound republic comprises one federal and one state government, 15 counties, 91 municipalities, 21 tribes, 33 state agencies, 218 school districts, 12 community college districts, 302 special districts, hundreds of NGOs, 80 colonias, scores of community councils, thousands of neighborhood associations, and 1,700 homeowners associations.

[2] Indian reservations extend across counties, but only tribal headquarters are designated by county (e.g., Navajo Nation headquarters are in Apache County). New Mexico's Pueblo of Zuni owns land in Apache County but is not counted as an Arizona tribe.

[3] Two tribes have their own community college districts, the Navajo Nation and the Tohono O'odham Nation.

Only Delaware and Hawaii have fewer counties than Arizona's 15, and with 91 municipalities, Arizona ranks far below the national average of 344 per state. Special districts, which numbered 312 in 2001, are those governed by independently elected boards and deliver one service. Examples of this type of single-purpose government include the Central Arizona Project, domestic water improvement, hospitals, and road districts.

This chapter covers legal, procedural, and fiscal aspects of local-state relations and the institutions that shape them. Relationships are viewed from the perspective of counties, cities, and towns.

Local-State Legal Relationships

In a legal sense, state government is superior to counties and municipalities. Local governments, especially counties, are the legal creation of states. The Arizona Constitution, under Article XII, created counties as bodies politic and corporate "to be the counties of the State" and established all elected officers, whose compensation, duties, powers, and qualifications are fixed by law. Article XIII provides for the creation of cities and towns by the Legislature rather than by "special laws." Municipal corporations may also frame and adopt charters, enter into franchises, and engage in businesses and enterprises. Counties are circumscribed in Arizona Revised Statutes (ARS) Title 11, which contains 10 chapters, 58 articles, and hundreds of sections that both enable and restrict county governance.

ARS 11-202 gets to the heart of county-state relations. It states that counties possess "powers expressly provided in the constitution or laws of this state and such powers as are necessarily implied therefrom."

Counties may only do what the Legislature allows them to do. Cities and towns, as expressed under ARS Title 9 (with 12 chapters, 44 articles, and hundreds of sections) are given, "all the powers, duties, rights and privileges as granted … under the laws and constitution of this state." In case law and practice, however, municipalities can engage in activities that are not prohibited by statute.[1]

Municipalities clearly have more latitude and flexibility than do Arizona counties. In the 1931 case *Price v. State*, the court ruled that "powers granted to a city are those granted in express words, those necessarily or fairly implied in or incident to powers expressly granted, and those essential to accomplishment of declared objectives of corporation."[2] Land use appears to be the most heavily regulated area of municipal powers, as exemplified in Title 9, Chapter 4, Articles 6, 6.1, 6.2, 6.3, 6.4, 7 and their 48 sections that tighten latitude.

The debate about where to draw the line regarding state authority over counties and municipalities embodies the push-pull of state-local relations. As a 1938 decision of the Arizona Supreme Court ruled, "in the absence of a constitutional restriction, the power of the legislature over municipal corporations is practically unlimited."

The Arizona courts generally limit local power and authority.[3] However, in spite of constitutional and legislative measures that constrain local government authority, counties and municipalities have a measure of autonomy founded upon a strong tradition of local control and professional management. Municipalities, especially, consistently resist efforts by the state to diminish their powers.

The League of Arizona Cities and Towns recently launched a challenge that opposed HB2209, a 2008 bill that required counties, cities, and towns to make a "contribution" of $29.7 million to the state general fund. The league argued it was unconstitutional because it was a "tax, fee or assessment" benefiting the general fund that was enacted without the two-thirds supermajority in the Legislature required under Proposition 108. The league also challenged it on the grounds that it was contained in an appropriations bill but did not actually appropriate funds. Municipalities prevailed in the challenge, and while the counties did not join in the lawsuit, they also did not have to pay the assessment.[4]

Local-State Procedural Relationships

Counties, cities, and towns have created statewide voluntary organizations to represent their interests at the state Legislature, the executive, and the judiciary. These organizations also connect local governments to federal agencies, the White House Intergovernmental Affairs Office, and their respective national organizations. Most play an educational role as well, providing opportunities for professional development, research, and networking.

County governments in Arizona have created two organizations to represent their interests before the state and federal governments. The Arizona Association of Counties (AACo), established in 1968, represents all elected county officials except superior court judges. The organization seeks to advance issues with the state and federal governments, educate the public on county government, and help counties find innovative approaches to save money. A board of directors comprising elected officials representing each office and each county guides AACo. (Voters elect a governing body of three to five supervisors as well as seven constitutional officers who oversee specific departments [e.g., treasurer, assessor, and recorder] and justices of the peace.)

AACo's central mission is to develop a platform of resolutions and policy priorities for the Legislature before each session.[5] Elements of its County Government Platform include preservation of local control and opposition to unfunded mandates and cost shifts (e.g., transferring state prisoners to county jails). Each of the nine groups of elected county officials works through its affiliates to develop intergovernmental strategies and presents them to AACo's board of directors. The board strives to advance the interests of all affiliates while balancing the interests of all members who come from different geographic regions with varied issues.

Members tend to unify most easily when trying to defeat or derail legislative proposals that would hurt all counties, such as those mandating changes and programs without

funding and those that shift state costs to counties. While the biggest legislative threat to counties involves fiscal matters, AACo can and does take the legislative offensive in measures that would streamline processes embedded in law. A recent success was in getting a change to an elections procedure regarding voter identification. This change will save counties millions of dollars over the course of two election cycles. The majority of AACo's efforts, however, are defensive in nature, involving tracking the 1,100 bills out of 1,400 that might harm counties and then proceeding to educate legislators on their liabilities.[6]

The County Supervisors Association of Arizona (CSA) represents the 55 supervisors and 15 managers of all counties. For more than 30 years, CSA has served as a "non-partisan forum for officials to address important issues facing local constituents, providing a mechanism to share information and to develop a proactive state and federal policy agenda."[7]

Like AACo, CSA works through a board of directors to develop an annual legislative agenda, provide education and research, and participate in conferences and policy development with the National Association of Counties (NACo). All supervisors serve on the board of directors, and each county appoints a representative to CSA's Legislative Policy Committee, which makes policy recommendations to the full board. Like the two other local government advocacy organizations, CSA plays a big role in tracking and estimating county impacts of proposed legislation, proceeding then to educate county officials and legislators on their impacts. Elected county officials then devote a great deal of time testifying before legislative committees and otherwise talking with legislators and their staff, agency personnel, and the governor's office.

The League of Arizona Cities and Towns (LACT) is a voluntary membership made up of all 91 incorporated cities and towns. It serves as a unifying voice to promote local self-government and provide legal and technical service to members. LACT's principal activity is representing the interests of municipalities before the Legislature, striving to protect local autonomy and preserve state-shared revenues above all.

Members develop an annual legislative agenda called the Municipal Policy Statement and give testimony to legislative committees.[8] As an example, municipal officials testified against SB 1070, the "immigration" bill, describing this effort as a case of "fighting a phantom and making local governments pay for it." The controversial proposal, thus, was opposed on the grounds that it was an unfunded mandate rather than immigration reform. Of the 1,400 bills typically introduced in the Legislature, LACT tracks about half, seeking primarily to halt harmful ones. As one official describes, "the league's pro-active agenda is very limited."

The process of developing relations with legislators begins at the campaign cycle, where staff and elected officials reach out to the candidates most likely to win. Before the new session begins, the three organizations hold educational meetings with legislators. At the beginning of each session, they hold "legislative days" at the capitol, where local officials meet with legislators and host a lunch. There is a belief among local government officials

that, because primary voters tend to be more extreme, those who win election are not reflective of the views of the majority of their constituents. Local government officials conclude, therefore, that the Legislature does not represent all constituents, only those who vote in primaries. Laments one executive director, "The days when the Legislature viewed local governments as partners in creating a healthy state are gone; being a political moderate is now held in disdain."

The three advocacy organizations are united in the belief that the central obstacle undermining local-state relations is the Legislature's "all-time … low level of knowledge of local governments." According to one county official, the Legislature is like a "board of directors that doesn't know its own company." Local government officials fear that "chatter at the precinct level" is what shapes the opinions of legislators on local matters.

Many legislators apparently even wonder why counties are needed; they tend to think that the state is "all urbanized." Financing and expenditures are complicated when legislators don't understand local governments "on a grassroots level," even though all of them live in counties and most in municipalities and receive or read about local service provision on a daily basis. Part of the problem driving the lack of knowledge and understanding is the fact that 30% of the Legislature turns over every two years. In general, say officials, Republicans think of counties as "unnecessary" and municipalities as more big government that needs to be restrained and regulated. Further, legislators don't like spending, but they won't cut state services to reduce spending. Instead, they look for ways to shift costs to local governments or reduce revenue sharing. Thus, the county and local organization's advocacy goals are simple: preserve state revenue sharing, halt cost shifts, and protect local autonomy.

Local government relations with the other branches of government are less contentious. The executive and judicial branches inherently lack the capacity to impact local governments on the scale that the Legislature can. The governor's office appoints a local government liaison who briefs the governor on the local impacts of proposed legislation, and has made available some federal stimulus money granted to the governor. The effectiveness of the liaison varies, however, because that position is rarely a key position in the governor's office.

According to municipal officials, the governor's office rarely invites them to policy discussions. A recent attempt to reshape the Department of Commerce into a policy advisory group, for example, did not include a single municipal representative in discussions. Municipalities also weren't consulted when the governor removed all lottery proceeds from programs that benefit communities, such as the Local Government Assistance Fund and the Heritage Fund. However, local governments fare better in their interactions with executive agencies, especially transportation, water resources, and housing.

There is little interaction between the state judiciary and municipalities other than the court's guidelines on open meetings and public records. However, municipalities chafe at the Administrative Office of the Courts taking the majority of fees, fines, and forfeitures

collected in municipal courts and using them for statewide purposes. Counties interact on a much greater scale because they finance superior courts, justice courts, probation, and clerk of superior courts.

Local-State Fiscal Environment

Fiscal issues that relate to the allocation of public resources are at the core of intergovernmental relations in Arizona. The intergovernmental relations picture is clarified by examining total public spending in Arizona, and by looking at which government branches increases spending and receive benefits.

The U.S. Census Bureau provides fiscal year 2006 combined spending data for both state and local governments. If spending on education is removed, state expenditures in Arizona reached $11.6 billion and local government expenditures amounted to $12.2 billion. (The Census Bureau mixes K–12 and community college spending in with other local government expenditures.) Further, census data reflect total spending, not general fund spending, so federal payments are included, which especially inflate expenditures for health and welfare. When that category is removed, state spending drops to $4.5 billion and local government spending drops to $11 billion. (Local government spending on education was significantly greater than state spending in 2006: $8.9 billion to $3.1 billion, respectively). Local governments outspent state government, even with education and health and welfare expenditures removed. Table 1.2, which includes spending on health and welfare, presents these U.S. Census Bureau data.

Table 1.2: State and Local Government Expenditures-Fiscal Year 2006[9]

Service Category	State Expenditures in Millions	Share	Local Expenditures in Millions	Share
Health-Welfare	$7,142	62%	$1,310	11%
Transportation	$1,372	12%	$1,502	12%
Public Safety	$1,161	10%	$2,990	24.5%
Environment-Housing	$595	5%	$2,736	22.5%
Administration	$579	5%	$1,588	13%
Debt Service	$405	3%	$903	7.5%
Other	$346	3%	$1,159	9.5%
Totals	$11,600	100%	$12,188	100%

In the 2001 Arizona Town Hall Report, “Pieces of Power,” expenditure data for fiscal year 2000 supports the 2006 census statistics. State government accounted for 29.5% of public expenditures in Arizona, and counties and municipalities accounted for 43.5%. This represents total spending and so does not reflect what state and local taxes pay for (i.e., the general fund), but the federal government transfers a far greater sum to states than to localities (although some federal transfers pass through to local governments). Moreover, 65% of federal revenues to Arizona went to health and welfare, and 20% to education. The rest went to transportation (11%), public safety, general government, and natural resources. State government spends far more than local governments on health and welfare, but nearly two-thirds comes from federal sources.[10]

Voters have had a large role in restricting and constraining state and local government revenues and expenditures. Inspired by the voter-initiated wave of constitutional and statutory limits on expenditures and revenues with California's Proposition 13, Arizona's 1980 version placed severe restrictions on what both the state and local governments can raise and spend.

Under Title 9 of the Arizona Constitution, taxes, spending and debt are circumscribed. One such outcome of these restrictions was the creation of the secondary property tax category, which is exempt from these limitations. Thus, local governments have been forced to create new voter-approved taxing districts in order to avoid revenue and expenditure limits and fulfill their service obligations. (The 1979–80 revenue or expenditure base, upon which annual increases are determined, soon prevented local governments from raising and spending what they needed. The base was readjusted in 2006 to reflect changing service demands and revenue capacity.)

The state gives municipalities greater taxing authority than counties, principally in the sales tax; the rate is unlimited (the average is 2%) and the base is broader (e.g., food for home preparation). Counties can only impose a one-half cent sales tax, which requires a unanimous vote of the board of supervisors or a public vote, and the county sales tax base is tied to that of the state. Further, municipalities but not counties receive a portion of the income tax revenues.

Arizona returns a portion of its tax revenues to local governments, as these taxes are generated in local stores, restaurants gas stations, and commercial activities that utilize local services in the process. Through a statutory formula, counties and municipalities get a share of state revenues from the income tax (municipalities only), transaction privilege tax , gasoline tax, vehicle license tax, and, until recently, lottery proceeds. According to local government representatives, many state legislators resent sharing these tax revenues but without understanding or acknowledging that well-governed localities are what make successful commercial activities possible. (Under the 1972 initiative that created the Urban Revenue Sharing system, municipalities gave up the right to impose their own income and excise taxes.)

One recent study on the role of cities and towns in the state's economy found that municipalities contained 82% of the population and 88% of the state's jobs and produced 91.4% of gross income and 91.4% of state income taxes. They also produce 93% of transaction privilege tax (TPT) revenues. Yet, the state shares only 11% of the income tax revenues and 8.6% of TPT revenues with cities and towns. Table 1.3 illustrates these findings for five municipalities.

Table 1.3: Revenue Sharing with Five Municipalities FY 2004-2005[114]

Type/Population	TPT to State	TPT from State[12]	Income Tax to State	Income Tax from State
Rural Town: Payson/14,000	$14 million	$1.3 million	$11.3 million	$1.3 million
Rural City: Kingman/21,000	$30.2 million	$1.9 million	$18.8 million	$1.84 million
Suburban Town: Marana/15,000	$48 million	$1.3 million	$7.5 million	$1.3 million
Suburban City: Peoria/108,000	$152 million	$10 million	$112.5 million	$10 million
Metro City: Tucson/486,000	$442 million	$45 million	$520 million[5]	$45 million

Percentages of the TPT shared with these five cities and towns range from 2.7% to 10%. Percentages of the income tax shared with these jurisdictions range from 8.6% to 17%. Municipalities are clearly the economic engines of Arizona, and in order to generate tax revenues for the state, they must incur major expenditures to attract, retain, and expand businesses. The study concludes, "Basic services appear to be just as important to economic health as specific economic development services … and a strong public service foundation is necessary. It appears that Arizona's cities and towns are good investments for both the state and the business communities."[13] Unique to municipalities, and one of the reasons why their basic services are essential to economic development, is the provision of water, sewer, and fire, services that other levels of full service governments do not provide.

Many counties have urbanized areas as well, and although they do not participate in urban revenue sharing, the TPT, gasoline, and VLT shared revenues are vital to their economic health. Counties, of course, spend most of their budgets on basic services, including prosecution, defense, adjudication and probation (expenses most municipalities do not incur) as well as vast systems of roads and bridges—services essential to economic growth. They do, however, contribute to those activities that promote economic development directly, such as making cash contributions to regional organizations.

It should be clear to legislators why protecting state-shared revenues is a major policy goal for counties and municipalities. A major policy goal for counties is to prevent unfunded mandates and cost-shifts. Because counties are administrative service providers for the state as well as local and regional governments, legislators find counties easier to manipulate than municipalities. Municipal and county officials also view counties as willing to make deals with the Legislature rather than fight against bad legislation (such as joining with the League of Arizona Cities and Towns in suing to prevent enactment of HB2209 in 2008).

Providing (and also paying for) state services such as property assessment, adjudication probation, and tax collection offers a direct avenue down which to shift state costs to

[4] Based on 2000 census figures
[5] Includes Oro Valley and South Tucson

counties. The most notable example in 2010 concerns juvenile corrections. Counties have the primary responsibility for juvenile inmates, but the most troubled prisoners are treated at the state facility. Federal regulations regarding juvenile education, health, dental, and segregation matters make juveniles very costly to detain. In an effort to balance the fiscal year 2011 state budget, the governor proposed eliminating the state juvenile corrections center and transferring that population to county facilities, at a savings of $63 million to the state.

However, these state savings would have shifted far more in costs to counties because of the money counties would have needed to spend to upgrade inadequate county facilities and programs for substance abuse, behavioral health, and education in county jails.

Counties began an extensive program to educate themselves on juvenile justice and then used their knowledge to educate legislators (LACT partnered with counties on this effort). As a result of CSA, AACo, and LACT efforts, the governor halted the proposal and created a commission on juvenile corrections reform to study the issue for one year. The proposal could be reintroduced in 2011.

SB 1070 is another example of the propensity for legislators to shift costs to local governments. Rather than raise taxes to fund the program, the Legislature is making sheriffs and police departments carry it out. Other estimated FY 2011 state budget cost shifts to counties include taking $14.25 million from the county share of the gasoline tax and giving it to the Department of Public Safety; eliminating the county assistance fund for $7.65 million; and making Pima and Maricopa counties give the state $34.6 million, for a total hit of $78.3 million.[14]

This brief review of intergovernmental relations in Arizona, through a local government perspective, may suggest that counties, cities, and towns are not just partners with the state in providing services, but play the dominant role. A change in the state perspective on intergovernmental relations to reflect this suggestion—and the fiscal environment that underlies this observation—may benefit the entire state in the long run.

Tanis Salant has a PhD from University of Southern California in public administration. She conducted research and taught at the University of Arizona for many years until her recent retirement. The focus of her research is local government and includes county home rule, county-state relations, unfunded state mandates to county government, and county-tribal relations. She has published several book chapters, journal articles, and monographs on these subjects. She has also written about the impact of the border and immigration on county governments in the Southwest.

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[5] www.azcounties.org

[6] Nicole Stickler, executive director, Arizona Association of Counties, telephone interview August 20, 2010.
[7] www.countysupervisors.org
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[10] Salant, p. 115.
[11] *The Role of Arizona Cities and Towns in the State's Economy*, Economic and Business Research Center, Eller College of Management, The University of Arizona
[12] Arizona Department of Revenue 2005 Annual Report
[13] Tanis J. Salant, Alberta Charney, and Marshall J. Vest, "The Role of Arizona Cities and Towns in the State's Economy," *Arizona's Economy*, April 2007, Tucson: Economic and Business Research, Eller College of Management, The University of Arizona, p. 8.
[14] Craig Sullivan, 2010 Legislative Session in Review, presentation to Arizona City-County Management Association, July 29, 2010.

Chapter 7

Tribal Governments in Arizona

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Key Points

- While the Federal government's relationship with Native American tribes is defined by the Constitution, states are generally left to define their relationship with tribes.
- Judicial rulings, federal law, and tribal treaties have kept state jurisdiction on reservations to a minimum.
- The state of Arizona has control over all criminal and some civil jurisdiction on Native American land. The state also has provided public education and voting rights to Native people in Arizona.
- State-tribal relations are ever changing and are often complicated. Jurisdictional issues vary from tribe to tribe and issue to issue and are still being debated.
- With the increase in tribal gaming revenues, the state has become increasingly connected to the various tribes in several ways. The two main tribal-state institutions are the the Arizona Commission of Indian Affairs and the Intertribal Council of Arizona
- Tribes contribute 1-8% of gaming revenues to state and local governments, creating funding for several departments and agencies.
- Tribal relations to counties and municipalities are generally good, with tribes providing funding for a variety of projects, grants, etc.
- The tribes in Arizona vary greatly in size and composition. Arizona contains three types of tribes: rural, suburban and urban and each faces unique challenges.

Introduction

Arizona has a comparatively large number of tribal governments, tribal citizens, tribal lands, and tribal political representatives. With 562 federally recognized tribes in the United States (half of those are in Alaska and more than 200 are in California), the average number of tribes per state is 11. Arizona, however, is home to 21 Indian tribes located on 20 reservations. Tribes control 26% of the state's land base—19.8 million acres—and several thousand more acres are owned off-reservation. Enrolled members comprise about 5% of the state's population and members of various tribes hold elective office in state, county and school district governments. Hundreds more hold professional positions in those agencies.

Moreover, Indian tribes routinely provide public services to their residents and enter into intergovernmental agreements to provide services jointly with city, county, and state agencies. Arizona tribes also contribute significantly to the state's economy. Since the United States approved the Indian Gaming Regulatory Act in 1988 and Arizona first entered into gaming compacts with its tribes in 1992, millions of dollars in gaming revenues have

streamed into state coffers and funded community projects in counties, cities, and towns. Millions more have been donated to charitable causes and non-profit social service agencies.

Indian tribes in Arizona, thus, are firmly embedded in the political, social, and administrative life of the state. This chapter provides an overview of Arizona's Indian tribes and discusses ways in which tribal institutions are linked with those of the state and local governments—both because of and in spite of tribal sovereignty. Three of Arizona's tribes—one rural, one suburban, and one urban—are also described in detail. A glance at Arizona's Indian tribes is provided in table 1.

Sovereign or Domestic Dependent Nations?

Federally recognized Indian tribes are considered sovereign nations and protected by the Constitution, legal precedent and treaties, while Congress maintains trust responsibility. Tribal sovereignty is grounded in the fact that tribes pre-dated the formation of the United States; self-rule is at the heart of sovereignty, where tribes establish their own constitutions, by-laws, and legal codes.[1] The role of the federal government in tribal affairs is clear. Less clear are the roles of states and local governments, especially counties with reservations inside their boundaries.

The Constitution defines the relationship between the federal government and states in the 10th Amendment, but states are often left to define their own relationship with tribes. Moreover, inconsistencies in case law leave states and tribes to sort out jurisdictional issues one at a time. Article 1, Section 8 of the Constitution, provides this guidance: "The Congress shall have the power … to regulate commerce with foreign nations, and among the several states, and with the Indian tribes." Treaties, executive orders, case law, federal statutes, federal regulations, and Congressional appropriations have shaped the status of tribes in the United States. But generally states and tribes exist as mutual sovereigns, sharing contiguous geographic areas and common citizens.[2]

Judicial rulings, federal law, and tribal treaties have kept state jurisdiction on reservations to a minimum. The basic principles upon which state-tribal relations are based were delineated in early 19th century in *Worcester v. Georgia.* The ruling followed an attempt on the part of the state of Georgia to preempt federal law on the Cherokee Nation Reservation, clarifying the following:

- No state criminal or civil jurisdiction over Indians
- No taxation of Indian-owned property
- No taxation of income derived by an Indian
- Limited sales taxation on Indian merchants
- No regulation of land use
- No authority over domestic relations
- No imposing game and fish laws

Worcester v. Georgia further described tribes as "domestic dependent nations," and the case underlies tribal-state relations today.[3]

Tribes and Arizona

Federal legislation enacted in 1953 sought to end the ward status of tribes with House Concurrent Resolution No.108 and Public Law No. 83-280 (P.L. 280). These two measures asserted the need to make Native Americans "subject to the same laws and entitled to the same privileges and responsibilities as are applicable to other citizens of the United States, and to grant them all the rights and prerogatives pertaining to American citizenship."[4] Public Law 280 was ostensibly crafted to help tribes control reservation crime by granting states jurisdiction over criminal and some civil affairs. But an implicit purpose of Congress, in extending state control on reservations, was to reduce federal expenditures by replacing tribal court systems with their own courts.[5]

Congress mandated that five states become "P.L. 280 states" and assume full criminal and some civil jurisdiction on reservations. Arizona chose to come under P.L. 280, and thus undertook jurisdiction over "all Indian country within the state, limited to enforcement of the state's air and water pollution control laws."[6]

Other federal legislation in the 1950s extended the state public school system to the Navajo Reservation, which provided states with education funds for federally impacted areas. The first communities on the Navajo Reservation to benefit from these two public laws were Fort Defiance, Window Rock and Ganado. With the advent of state schools on the Navajo Reservation, the Navajos began to seek election to state school boards, a foray into non-tribal politics that led to their subsequent involvement in state and county politics.[7]

The 1965 Voting Rights Act also affected state relations with tribes by designating certain states in the Southwest to be covered by special provisions to increase minority political representation. Arizona was the only one of the Southwestern states to receive this designation. It meant that Coconino, Navajo and Apache counties had one of two courses of action to take whenever they changed their voting procedures (i.e., redrew their precinct boundaries): counties could either send proposed boundary changes to the Department of Justice for pre-clearance, or they could take the proposed changes to court seeking a declaratory judgment. Thus, disputes over Arizona redistricting would be settled at the federal level. The Section 5 designation for Arizona remains in effect and guides all boundary changes today.

Tribal-State Relations

Federal law and policy are supreme over state law with regard to tribal reservation land [Arizona Revised Statutes (ARS) const. Art. 20, Par.4; Act June 20, 1910, Para.20, 36 Stat.557.] However, Arizona Constitution Article 20, Par. 4, also states that "State laws apply on Indian reservations unless their application would impair rights granted, reserved, or protected by federal law or would interfere with tribal self-government."

Reservation lands are within political and governmental, as well as geographical, boundaries of the state and they are not immune from the reach of state governmental authority. In becoming a P.L. 280 state with limited jurisdiction, Arizona exercises some rights in environmental and air quality.

But state jurisdiction on reservation lands is still undergoing clarification in the courts. In *United States v. Superior Court in and for Maricopa County* [144 Ariz.265, 697, P2d. 658 (1985)], the right of Arizona to adjudicate Indian claims to stream waters was affirmed. The ruling concluded that, "The state of Arizona may exercise jurisdiction in Indian country where it acts in accordance with the will of Congress and not contrary to the right of Indian self-government."[8]

The current debate over states' rights and tribal sovereignty, thus, concerns the degree of jurisdiction within reservation boundaries rather than sovereignty itself. Some of the state-tribal jurisdictional issues involve taxation, public school districting, elections, regulation, land use, transportation, rights of way, water rights, and gaming.

A lawyer in the state attorney general's office described the current status of state-tribal relations as this: "Indian law is extremely complex and the direction to take on state-tribal issues varies from tribe to tribe and the applicability of law varies from tribe to tribe depending on their own treaties and constitutions. These common jurisdictional issues are extremely fluid and under constant debate."[9]

Tribal-State Institutions

Navajos and a smattering of other tribes have been electing members to the Arizona Legislature since the 1970s. District 2 covers the Navajo and Hopi reservations. Two Navajos and one non-Native (who lives on the Hopi Reservation) are serving in the 49th House of Representatives. The election of Indians to state and county offices has not been conflict-free, however. Participation in off-reservation politics began in the 1950s and slowly gained momentum in the 1970s, with massive voter-registration drives. Apache County voters elected Navajo Tom Shirley to the board of supervisors, but the board refused to seat him. Rulings of the Arizona Supreme Court as well as a federal order to reapportion electoral districts in the county led to two of the three supervisorial seats going to Navajos.[10]

Other institutions that connect tribes and the state are:

- The Arizona Commission of Indian Affairs (ACIA), which was established by the state in 1953 to represent the interests of tribes and to moderate state-tribal affairs in developing and reaching mutual goals. Its mission is "to build partnerships to enhance intergovernmental relations, social and economic prosperity for the 21 Indian Tribes/Nations of Arizona." The commission is composed of nine members appointed by the governor, seven of whom are from tribes and two who are at large non-Indians. Nine ex-officio members include the governor and attorney general. ACIA publishes an annual directory of tribal governments, sponsors an annual Indian Town Hall, and facilitates an Indian nations and tribes legislative day at the beginning of each

legislative session. Administered by an executive director appointed by the governor, the ACIA generally assists and supports state and federal agencies in helping Indians and tribal councils to develop mutual goals and design projects that will accomplish those goals.[11]

- The Intertribal Council of Arizona (ITCA), which was created in 1952 to provide a "united voice for tribal governments … to address common issues and concerns." In 1975 ITCA incorporated as a private, non-profit entity to "promote Indian self-reliance through public policy development" and provide information vital to Indian community self-development. Its membership comprises elected officials from all tribes except the Navajo Nation and is governed by a board of directors and administered by an appointed staff of 50. ITCA operates more than 20 projects that provide technical assistance and training in planning and development, research and data collection, resource development, management, and evaluation. It sponsors forums, workshops, and conferences that are designed to facilitate tribal participation in the formulation of public policy at the federal and state levels. Programs focus on health, environmental quality, water policy, aging, workforce development, transportation, and cultural resource protection.[12]

With tribes generating substantial revenues from gaming, they have become higher priorities. In the 1990s, Arizona governors started proactively working with tribes by establishing a tribal liaison in each state agency and in the governor's office.

While ACIA fulfills an educational role, the liaisons are more involved in navigating specific policy issues. Gov. Brewer's tribal liaison, who works with each agency liaison, holds a law degree, a fact considered to be useful because the job is a "policy role in the end." Liaisons often work with the attorney general's office and tribal lawyers. Most of the interactions between tribes and state agencies involve the Department of Gaming, particularly concerning the implementation of compacts. However, liaisons in the Tourism Office and the Department of Public Safety are particularly busy as well.[13]

Tribes and the State's Economy

Economists and forecasters often overlook the economic activity of Arizona tribes.[14] Arizona and the 21 Indian tribes entered into their first gaming compacts in 1993, setting forth types of games, technical statutes, state oversight in some areas, and requiring gaming tribes to contribute 1–8% of gaming revenues to the state and local governments.

The current compact was approved by Arizona voters in 2003 and was amended in 2009. It concerns vendor licensing, wager limits, contribution schedules, and reporting requirements, among other matters. Tribes funnel gaming profits through the "AZ Benefits Fund," which distributes contributions to problem gaming, Department of Gaming, Instructional Improvement Fund, Trauma and Emergency Services Fund, Arizona Wildlife Conservation Fund, and the State Tourism Fund.

Between fiscal year 2004 and May 2010, gaming contributions totaled $537 million. Tribes are also required to contribute 12% of the "1–8%" to counties, cities, and towns. That allocation, since adoption of the second compact, has amounted to more than $56 million.[15] Non-profits may also apply for the "12% Gaming Distribution" to individual tribes as long as they have a local government to serve as fiscal agent.

Grants are awarded to local governments either through a competitive process or by dedicating each year to a single category by individual tribes (e.g., public safety, economic development, children's programs, or education). Each tribe has its own application process and timetable, and councils make the final decision on awards. In addition, tribes also provide sponsorship of charitable causes and civic events, and individual casinos donate money to community activities. The Ak-Chin Indian Community, for example, recently donated $3.3 million to the Maricopa Unified School District to keep open an elementary school that was slated for closure.

What do tribes do with the remaining 92-99% of their net gaming revenues? They build community colleges, fund college scholarships, establish or expand fire departments and emergency management services, build libraries, purchase ambulances, fund elder programs, provide housing and utilities, and develop enterprises on and off the reservation.

Long before tribes began operating full-service casinos with live tables and shows, the tribal governments and reservation residents—both Indian and non-Indian—have by necessity spent their incomes and revenues off reservation. Studies have documented off-reservation spending habits, in part to enlighten county and city voters that Indians do contribute to state and local taxes.

In 1994, for example, Coconino County commissioned a study to determine the contribution to the state, county and municipal sales tax collections of Navajo Nation residents in the Western Agency (Tuba City). Contributions to Coconino County's one-half cent sales tax amounted to about $5 million in fiscal year 1993, and the board of supervisors then allocated $1 million for a solid waste management project in Tuba City.[16]

Tribal-County Relations

Reservation boundaries can be nestled within a single county or spread across several. Arizona's largest tribe in both population and area is the Navajo Nation, which sprawls across six counties in three states.

While reservation residents do not vote in municipal elections, they do vote for county offices and on measures. Navajos have been getting elected to county supervisor seats in Coconino, Navajo and Apache counties for decades. In fact, the Navajos control the Apache County Board of Supervisors and have elected several Navajos to other county offices as well (e.g., county school superintendent). Counties also establish county annexes on the Navajo Reservation and hire Navajos to staff it.

Intergovernmental agreements between tribes and counties are common. Road grading, elections, senior citizen services, community and health services, and vocational education are typical service areas for tribal-county cooperation.[17] County sheriffs usually play the most extensive role on the Navajo Reservation, and the construction and operation of sheriff substations is the most expensive service provided to reservations. While tribal police are primarily responsible for enforcing laws on the reservation, jurisdiction over non-members falls to the county sheriff.

The case of Apache County illuminates typical tribal-county relations: Two-thirds of the county's population live on the reservation and thus control two-thirds of the governing board. Discussions surface occasionally about moving the county seat from St. Johns to Window Rock or constructing a domed stadium through bond financing in Ganado. But one of the two Navajo supervisors usually side with the non-Native supervisor and defeat these initiatives.

Tribal-Municipal Relations

Tribal operations can impact local economies. In the realm of economic development and local taxes, the tri-city region of Prescott, Prescott Valley and Chino Valley has experienced competition from the Yavapai-Prescott Tribe's retail center located just outside Prescott's boundaries. Though the tribe is very small, the center redirected $3 million–$4 million in tax revenues away from the tri-city region in 2003. Such competition has necessitated serious effort on the part of municipal officials to interact with various tribes.

Other examples include the Tonto Apache Tribe, contiguous to the town of Payson, which has developed commercial enterprises on its reservation that are capable of competing with businesses in town; and the Fort McDowell tribe, which developed a shopping mall on land it owns off-reservation.[18] A contemporary example pits the Tohono O'odham Nation's plans to build a casino-hotel complex on private property it owns near the city of Glendale against the wishes of the city council and some state legislators.[19]

Not all tribal-municipal interactions are competitive. The city of Mesa, for example, traded 25-acre feet of effluent for 20-acre feet of drinkable water with the Salt River Pima-Maricopa Indian Community. Another tribe-city project seeks to restore the 14-mile stretch of the Salt River bed from Granite Reef Dam to the Pima Freeway. The Gila River Indian Community provided a grant to the city of Avondale to develop and implement a video appearance system to link its city court with the city jail. The city of Globe and the San Carlos Apache Tribe entered into a cooperative strategic plan to build a mutually beneficial industrial park on both sides of the city-tribe boundary.[20]

Further, tribal leaders, who are elected, and tribal elders, who are not, routinely meet with municipal and county officials, attend swearing in ceremonies, and generally make their presence known when reservation land is close enough to municipal boundaries to be impacted by development decisions. During its explosive growth period, the recently incorporated city of Maricopa and the Ak-Chin Indian Community worked through many such issues, including cultural ones such as buried artifacts uncovered in development.

Tribal leaders also play significant roles as members of various planning agencies. The Tohono O'odham Nation and the Pascua Yaqui Tribe, for instance, each have a seat (and an equal vote) on the Pima Association of Governments (PAG) and the sales tax-supported Regional Transportation Authority. While local governments usually do not spend transportation funds on reservation land, members of PAG were cognizant of the fact that tribal governments participate in regional affairs and also spend huge sums of money off the reservation.[21]

Governing Three Indian Tribes

Arizona's Indian tribes govern themselves through democratic institutions, public services, and constitutions, articles of association and/or tribal codes. This section will provide an overview of the governance of three tribes—one rural, one suburban, and one urban. The institutions illustrate the tools of governance used by Arizona's tribes.

Rural: Tohono O'odham Nation

The Tohono O'odham Nation (TO) is the second largest tribe in terms of area and population. The reservation covers 2.8 million acres across four separate regions, with the largest parcel comprising 2.7 million acres in southwestern Pima County. Originally called the Papago Tribe, its constitution and by-laws were first adopted and approved in 1937; a new constitution, adopted in 1986, changed the name to Tohono O'odham Nation. The TO has 28,089 enrolled members, with 13,500 residing on the reservation.

Tribal government consists of three branches: legislative, executive, and judicial, which exist "together in a system of checks and balances [that] allows the Nation to conduct business with the assurance that each branch will keep the other two in harmony."[22]

The reservation is subdivided into 11 districts, and tribal headquarters and departments are located in the district of Sells. The legislative council is made up of 22 members—two representatives from each district elected to four-year terms. The executive branch consists of a chairman and vice chairman who are elected at large every four years. The judicial branch consists of courts, four judges and one court solicitor, all appointed by the council to six-year staggered terms. Justices select a chief judge to serve for two years, and that person designates one or more judges to serve on the children's court. The judiciary also has a court of appeals. The constitution provides for referendum, initiative, removal, and recall.

The constitution also grants broad fiscal powers to the legislative council, including adopting, amending, and approving annual budgets and levying duties, fees, taxes, and assessments on any person, corporation, or association residing or doing business on the reservation. The council also has the authority to borrow money and issue revenue bonds. The chairman oversees the administration and management of the government, with authority to veto council enactments. The chair also appoints all department heads, who report to a tribal manager, called an administrative officer.

Each of the 11 districts is governed by at least 5 representatives, called the district council, elected either at large or from district villages, to 4-year terms. District councils also select a secretary and treasurer. The constitution directs the district councils to preside over "matters of local concern, except that in any matter involving more than one district in which there is a dispute, the Tohono O'odham Council shall decide the matter." The council must approve district budgets.

Ten broad departments are organized as part of the executive branch. They include education, recreation, administrative support, membership services, health and human services, natural resources, planning and economic development, public safety, and gaming. Administrative departments employ about 1,200 people and in 2010 have an operating budget of $76.5 million.

Suburban: Ak-Chin Indian Community

The Ak-Chin Indian Community (ACIC) governs itself through Articles of Association adopted in 1961. It provides for democratic elections for a five-member council, at large for three-year terms on a staggered basis. The council serves as both the legislative and executive branches. It adopts the laws of the tribe, develops and adopts the tribal budget, and administers all departments. The tribal judiciary is an independent branch, and judges are hired by the council under contract. The council has considered drafting and adopting a constitution on several occasions, as the Articles of Association do not permit amendment, and council members are particularly interested in direct election of its chair and vice chair.[23]

The reservation is situated in western Pinal County, adjacent to the city of Maricopa. Established by President Taft in 1912 with 48,000 acres, the ACIC's land was reduced to 22,000 acres the following year. The economy is based on agriculture and commercial activity. The north-south Smith Wash provides a buffer zone that separates and preserves the rural and traditional nature of the tribe on the west side and the commercial nature on the east side. Most members live west of the Smith Wash and commercial enterprises, including Ak-Chin Harrah's Resort and Casino, are situated east of Smith Wash.

The ACIC is a full-service government transitioning to a suburban existence while preserving its rural heritage. Members live in tribal-built and -owned housing developments free of rent and utility costs. Public services include police and detention, fire and emergency services, judicial, prosecution and defense, elder center, sanitation, facilities maintenance, and pre-school and childcare. Internal departments include finance, human resources, information technology and geographic information services, capital projects, grants, and contracts, among others.

The ACIC purchased land off the reservation for an industrial park, for which it is developing a marketing plan for light industry, agriculture, and water conservation. Hickman's Egg Farm, the Southern Pines Golf Course, and a nearby airport are recent enterprises. The tribe imposes a sales tax on commercial enterprises as well as leasing fees.

Elected tribal officials state that the tribe knows what it wants for the future. They urge federal, state, county, and municipal officials to understand that the Ak-Chin, above all, is a community. Rights-of-way and road encroachment are the most important issues in preserving unity. The tribe also regularly works with officials of Pinal County and the cities of Maricopa and Casa Grande. Membership has reached 889, with 200 members living off the reservation and another 200–300 non-members living on the reservation.

Urban: Salt River Pima-Maricopa Indian Community

The Salt River Pima-Maricopa Indian Community (SRPMIC) is Arizona's most urban tribe and embraces its location. The reservation is bordered by the cities of Scottsdale, Tempe, Mesa, and Fountain Hills.

The tribe was established by presidential executive order in 1879, making it one of Arizona's oldest federally recognized tribes. The reservation encompasses 52,600 acres. Commercial development is permitted on its western boundary called "the Pima Corridor," and agricultural enterprisesare cultivated in the middle of the reservation. A natural preserve of 19,000 acres is protected in the eastern portion. Membership has reached about 10,000 people, with 70% living on the reservation.

The SRPMIC is governed by a president and vice president, elected at large to four-year terms, and a seven-member tribal council, elected by district to four-year terms. The reservation is divided into two districts for purposes of political representation; five council members represent one district and two represent the second. The tribe is also managed by a community manager and two assistant community managers. Government departments employ about 1,600 people and operate with a budget of $140 million, adopted annually by the council.

The tribal council's responsibilities are embedded in history and culture. Its vision is to embrace "the spirit of our ancestors, elders' wisdom, and create a legacy of honor, pride and respect for our future generations."[24] Five goals frame the council's direction: protect, preserve, and sustain the land and environmental balance; embrace sovereignty; promote a spiritual, mental, emotional, and physically healthy lifestyle; make a commitment to education; and plan economic growth to secure financial security. Constitutional responsibilities include fiscal, police, and land use powers, among others.

The president and vice president and tribal management team oversee a multitude of departments that reflect full-service government. They include administration, community development, legal services, regulatory agencies, community relations, congressional and legislative affairs, corrections, education, engineering, finance, fire, health services, human resources, information technology, public works, transportation, and treasurer. The president and vice president vote on matters before the council. The judiciary is a separate branch; the chief judge is elected, and the Community Council appoints the other six to seven judges.

The vision statement for economic development exemplifies the urban nature of SRPMIC. The tribe seeks "a balancing of forces of economic development with the foundations of

established community values," such as sense of community pride, vision, and destiny that are essential to the worth of any project.[25]

The SRPMIC has adopted a general plan as its blueprint for land use, development, conservation, and preservation. The western portion of the reservation is dedicated to commercial and industrial enterprises, such as Saddleback Communications, Salt River Commercial Landfill, Salt River Devco (asset management), Salt River Financial Services Institution, Salt River Gaming Enterprises (two casinos), Salt River Materials Group, and Talking Stick Golf Course.

Conclusion

The United States federal system gives recognition to the existence of multiple powers within political boundaries, and the U.S. Constitution sorts out jurisdiction among the federal, state, and tribal governments. Intergovernmental relations are structured to settle differences and disputes while respecting the sovereignty of other units or levels of government.

A look at three Arizona Indian tribes, representing rural, suburban, and urban governance, demonstrates that tribes in Arizona operate as full-service governments, the scope and resources of which depend on population, area, and location as well as tribal leadership and tribal goals. They also have extensive relations with the state and local governments. Arizona tribes are clearly governing in an era of nation-building. "Tribes are alive and functioning as governments and societies, attentive to changing needs and social circumstances, and spurred to promote economic, social, political and spiritual development of their own communities."[26]

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Chapter 8

Elections: Process and Participation

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Key Points

- In order to run for election in Arizona, candidates must be qualified via age, citizenship and district residency; candidates usually run through a partisan primary.
- Running for office is generally a long, complicated and expensive process; campaign finance plays a major role in the success or failure of a candidate. Arizona has tried to implement campaign finance reforms via Arizona Clean Elections, but there are still issues.
- There are several sources of information about candidates in Arizona, including: the media, nonprofits, for-profits, campaign ads, government agencies and party affiliations.
- Voting in Arizona can be done two ways: by mail or in person. There are several ideas of how to increase efficiency in voting practices but each has a weakness; it seems there is no solution that is perfect for every Arizona voter.
- A high voter turnout is much more likely during general elections versus primary elections and there are several emerging ideas on how to attract and encourage voters.

Overview

This chapter summarizes the structure of Arizona's election system: who can run for office, who can vote, and how the voting process works. It also examines factors other than the legal structure that influence the conduct of elections—the role of money and other resources in determining how campaigns are run and who can participate actively; the influence of organizations such as political parties, interest groups, and the media; and the mechanics of casting and counting ballots, which have been the source of much controversy and concern since the 2000 presidential election. In each section, the chapter examines not only current practice but also alternatives that have been proposed and, in some cases, implemented in other places.

Who Can Be Elected to Office?

The Arizona Constitution prescribes the basic qualifications for potential officeholders: age, citizenship, and residency in the district from which they seek to be elected.[2] Only two public

[1] The views expressed herein are the views of the author and not the firm or its clients.

[2] All officeholders must be qualified voters in the district in which they seek to be elected. Ariz. Const. art. VII § 15; *see also* A.R.S. §§ 38-201, 11-121. Candidates for Governor, Secretary of State, State Treasurer, and Superintendent of Public Instruction must be 25 years of age or older, a U.S. citizen for ten years, and a citizen

offices carry special substantive knowledge requirements: the attorney general must be licensed to practice law and the state mine inspector must have practical experience in the mining industry.[3] All potential officeholders follow the same basic process: announce their candidacy, open a campaign committee to raise and spend money to support their campaign, gather nomination petition signatures from voters who live in their district, and urge voters to support them on election day.[1]

In addition, candidates for most public offices must go through a partisan primary election in which they compete with other candidates from the same party, from which only the top one or more candidates advance to the general election to compete with nominees of other parties for the same office.[2] Candidates who are not affiliated with any political party must file nomination petitions in order to appear on the general election ballot without any party affiliation.[3]

But those are just the mechanics. The practical reality is that running for office takes time and money, as well as some skill in reaching and connecting with prospective voters.

Campaign Finance

Candidates can draw campaign funds from three sources: private, personal, and public.

Money pays for websites, signs, flyers, and mailers; television or radio advertisements; travel and event expenses to meet with potential supporters; and, for larger campaigns, campaign staff and consultants.

The need to raise that money adds to the candidates' already time-consuming work of reaching and persuading voters, and, some argue, may make officeholders beholden to those who provided funding for their campaigns. However, the increasing power of the Internet has given candidates the ability to stretch campaign dollars further; websites, online ads, and e-mails are much less expensive than television, radio, and direct mail.

Private fundraising is the longstanding, traditional method of funding campaigns. A candidate raising private funds takes contributions in limited amounts from individuals, political committees (sometimes called "PACs"), and political parties.

In the 2010 election, a candidate for governor could accept contributions of up to $840 from any individual person, with no limit on the total amount of contributions from individuals, as

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of Arizona for 5 years preceding their election. Ariz. Const. art. V § 2. Members of the Legislature must be 25 years of age, citizens of the United States, and must have been residents of the state for three years and residents of the county for one year prior to their election. Ariz. Const. art. IV, pt. 2, § 2.

[3] The attorney general must have been a licensed, practicing attorney for five years before taking office. A.R.S. § 41-191. The State Mine Inspector shall be 30 years of age or older, a resident of Arizona for 2 years prior to her or his election, and shall have at least seven years of mining experience. A.R.S. § 27-121.

well as $840 from any individual political committee.[4] There is a limit on how much of a campaign can be financed by political committees and parties (as opposed to individuals). For example, in 2010, the limit on political committee and party contributions to a candidate for governor is $83,448.

Candidates can also use unlimited amounts of their own money and accept unlimited contributions from members of their immediate families.[4]

In 1998, Arizona voters approved a ballot measure providing a third financial option for candidates running for statewide office and the Legislature.[5] Those candidates may receive public funding if they:

- Substantially reduce the amount of their private fundraising.
- Accept contributions only from individuals, not political committees or parties.
- Collect small $5 contributions from a minimum number of prospective constituents to demonstrate the seriousness of their campaign and the existence of some support among voters.[5]

The basic public funding amount available to a candidate for governor in 2010 is $707,447 for the primary election and $1,061,171 for the general election.[6] Legislative candidates in the same election were eligible for $14,319 in primary election money and $21,479 in general election funds.[7] Privately financed candidates sometimes raise and spend greater amounts.[8]

Until 2010, publicly funded candidates could receive additional money if the level of financial support for their opponents (through contributions or independent expenditures) exceeded the basic public funding amount; those "matching funds" were challenged in court and have been suspended pending the outcome of a constitutional challenge currently before the U.S. Supreme Court.[9]

Arizona's public financing system was created to address concerns that private fundraising reduces voter participation, discourages qualified candidates, and increases the influence of special interest groups who seek to influence government action by funding the campaigns of candidates who will vote on issues affecting those groups.[10]

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[4] A.R.S. § 16-905; *see also* www.azsos.gov/election/2010/Info/Campaign_Contribution_Limits_2010.htm (providing current inflation-adjusted limitations). Political committees with more than 500 individual donors can give larger amounts, between 4 and 5 times as much as smaller political committees. *Id.* The Supreme Court of the United States has held that the First Amendment prohibits limiting the amount of a candidate's own money that she or he can spend on a campaign. *See Buckley v. Valeo*, 424 U.S. 1, 52-53 (1976); *Davis v. F.E.C.*, 128 S.Ct. 2759, 2771 (2008).

[5] Proposition 200, codified at A.R.S. § 16-940 *et seq.* The City of Tucson has a similar public financing program available for City Council candidates. *See* CITY OF TUCSON, CANDIDATE INFORMATION PAMPHLET (2009), *available at* cms3.tucsonaz.gov/files/clerks/pdf/2009CandidatePamphlet.pdf.

Critics of the public financing system say that it has not achieved its goals of encouraging ordinary citizens to run for office or decreasing the advantage of incumbents; that it has contributed to the rise of more ideologically extreme officeholders; that it is an improper use of public funds; and that its restrictions on candidate conduct chill freedom of speech.[11]

In addition to money raised and spent by candidates, other people who are interested in elections can spend money to try to influence election results. Expenditures made directly to support a candidate—such as placing an advertisement or sending a mailer—that are prepared and distributed without coordinating with the candidate are not subject to the same limitations as direct campaign contributions.[12] Interested individuals and groups can spend unlimited amounts of money on these independent expenditures.

As of January 2010, because of a U.S. Supreme Court decision, corporations and unions (which cannot give money directly to Arizona candidates) can also spend unlimited amounts on these direct election-related communications.[13] Spending on ballot measure campaigns is also unlimited.[14]

Only a few groups are forbidden from spending money to influence elections. Charitable organizations that take tax-exempt contributions are forbidden by tax law from using the money they raise to influence candidate elections.[15] Foreign nationals—non-U.S. citizens who are not lawful permanent residents—cannot make political contributions for either candidate or ballot measure elections.[16] Registered lobbyists cannot make or solicit contributions to the reelection campaigns of the governor or legislators while legislation is pending.[17] And Arizona law prohibits various public bodies—counties, cities, and K-20 public schools—from using their resources to influence voters in either candidate or ballot measure elections.[18]

Along with money and time, candidates need to have some knowledge of the mechanics and strategy of campaigns—how to most effectively reach voters, communicate their positions, and convince voters that they are the best choice. Candidates with enough funding can also hire paid consultants to help with campaign strategy, communications, and polling to test messages. Many candidates get their start working on the campaigns of others or for political parties, learning the ropes from more experienced staffers and volunteers. Some private groups have begun holding free training sessions to teach like-minded individuals how to become effective campaigners.[6]

Lastly, officeholding itself comes with opportunity costs. Once elected, officeholders may not have time to maintain other paying jobs (and some officeholders are forbidden from engaging in outside businesses), and they may take a pay cut in order to serve the public. For example, members of the part-time Legislature are paid only $24,000 per year, plus a daily

[6] For example, the Center for Progressive Leadership (candidate.progressiveleadership.org/candidate.php/application/program/az) and the American Majority (americanmajority.org/events/phoenix-az-candidate-training/) have recently held trainings for potential candidates and activists in Arizona, providing information on campaign mechanics and strategy to people interested in running for office or working on campaigns.

stipend of $35 or $60 while engaged in legislative business.[7] The full schedule of substantive work during a legislative session makes it difficult to hold another job while the Legislature is in session. Increases in legislative pay have been proposed, but no such proposal has passed since 1998.[19]

Who Can Vote?

In order to register to vote in an Arizona election, an individual must:

- Be a citizen of the United States
- Be 18 years of age as of the date of the next general election
- Have been a resident of the state for 29 days prior to the next election
- Not have been convicted of treason or any felony, unless his or her civil rights have been restored
- Not have been pronounced incompetent by a court.[8]

All voters may vote in the general election; party primary elections are limited to registered members of that party or, in some instances, voters who have registered as independent or no party preference (who may choose one party's primary in which to vote).[9]

Voter registrations remain valid for multiple elections.[20] Voter registration forms must be supplied free of charge by various county and local government officials, and the Arizona Motor Vehicle Division must also permit anyone applying for a driver's license to register to vote at the same time.[21] Voters can register online, by mail, or in person.[10]

In 2004, Arizona voters approved a ballot measure requiring all voters to prove their U.S. citizenship at the time they register to vote.[22] In order to satisfy this requirement, the voter must provide either the number of a valid Arizona driver's license or identification card issued after October 1, 1996, or copies of certain identifying documents (such as a birth

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[7] The stipend for Maricopa County residents is $35; residents of other counties receive $60 per day. *See* A.R.S. §§ 41-1103, 41-1904(D); *Proposition 300*, ARIZONA SECRETARY OF STATE, 2008 PUBLICITY PAMPHLET (2008), *available at* http://www.azsos.gov/election/2008/info/PubPamphlet/english/Prop300.htm; *see also* Heather Perkins, *State Government Compensation by Branch* (The Council of State Governments July 1, 2009), *available at* knowledgecenter.csg.org/drupal/system/files/TIA_FF_StateCompensation_final.pdf.

[8] A.R.S. § 16-101; *see also* Ariz. Const. art. VII § 2. Special provisions are made for homeless persons or persons who reside in the state but do not have a fixed address. A.R.S. § 16-121.

[9] A.R.S. § 16-542(A). The Libertarian Party has obtained a federal court order barring persons not registered as Libertarians from voting in its party primary.

[10] Only those who can satisfy the citizenship proof requirement through a Driver's license number can register online. For comprehensive registration instructions, see www.azsos.gov/election/How_to_register.htm.

certificate or passport).[11] Voters who registered prior to 2004 and need to change their name, address, or party registration are not required to prove their citizenship unless they move between counties.[23]

Not all jurisdictions limit voting to citizens. Some permit non-citizen residents to vote in particular elections—such as school district elections.[24] In addition, the ability to vote in certain special districts is based on some other attribute, as in the case of special taxing districts whose voters are those who own the property taxed by the special district.[25]

What Information Is Available to Voters?

Candidate campaigns are a major source of information for voters, as are the independent expenditures of political committees, parties, and non-profit, corporate, and union entities. All campaign expenditures and contributions must be reported, and all campaign-related advertisements must have disclaimers saying who paid for them.[26] These provisions are designed to give voters information about who is speaking for or against a candidate. However, if an organization gathers money from donors and then gives a contribution in its own name, it can be difficult for voters to trace the original source of the funds.

In addition to communications expressly encouraging a vote for a particular candidate, non-profit and for-profit organizations may also distribute information about issues relevant to elections or publish candidates' responses to surveys about their views.[12] Media sources also report public information about candidates, both in the form of ongoing campaign news coverage and in survey responses or editorial board endorsements.

Government agencies also provide information about candidates and ballot measures to the general public. The Citizens Clean Elections Commission sponsors debates in every race in which there is a publicly funded candidate. The commission also mails a pamphlet to every household of registered voters with self-submitted photos and statements from all candidates running for statewide or legislative office, whether or not those candidates are using public financing.[27] The Arizona secretary of state mails a pamphlet to every household of registered voters with information about pending ballot measures and the evaluations.[28] The same pamphlet also includes performance evaluations, completed by a commission of lawyers and members of the public, of every judge who is on the ballot for retention.[29]

Political party affiliation is another source of information for voters. Some voters use political party affiliation as an indicator of a candidate's views on issues, or they vote a straight ticket for all the nominees of a particular party.

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[11] In addition to passports and birth certificates, certain identifying numbers found on naturalization documents or tribal documents are permitted to satisfy this requirement. A.R.S. § 16-166(F).

[12] For example, the Center for Arizona's Future developed a list of citizen questions on a range of issues through polls, forums, and online submissions, and posted both the questions and candidate responses on its website. *See* www.TheArizonaWeWant.org. The League of Women Voters publishes a guide to ballot measures with a short summary of the measure and information about supporters and opponents. *See* http://www.vote411.org/home.php

An increasing number of voters are registering as "independent" or "no party preference," indicating a lack of affiliation with a single political party. As of August 2010, almost 31% of all registered Arizona voters were registered independents.[30] Nonetheless, candidates for almost all public offices are given the opportunity to list their party affiliation on the general election ballot by competing in a partisan primary election. And political parties themselves promote candidates nominated by their party to members, using volunteer efforts and political advertisements.

How are Votes Cast and Counted?

Arizona voters can cast ballots in three ways: by mail, at an early voting site, or in person on Election Day.[31] Each option has costs and benefits.

Voting by mail is easier to schedule around work, family, and other commitments. The voter can request the ballot in advance and fill it out at her leisure, with access to online and written materials about the candidates and ballot measures on which she is voting. The county recorders pay the cost of mailing the ballots back to be counted, so there is no additional cost for the voter.[32] And a voter who waits until the last minute can still cast a ballot on Election Day (subject to a confirmation she did not vote by mail also) or can submit her ballot at any polling place in her county.

Some states permit mail balloting only to those voters who are unable to be in the state on Election Day. Arizona has no such requirement. In fact, Arizona voters can ask to be placed on a permanent early voter list to receive a mail-in ballot in every election; they will receive a postcard every two years reminding them that they are on the list (and checking for returned mail indicating the voter no longer lives at that address).[33] Voters can also appear in person at a limited number of in-person early voting sites and cast a ballot before Election Day.[34]

One state, Oregon, has switched to entirely mail-in balloting, which supporters say has saved substantial public money.[35] Opponents of mail-in ballots cite security issues and concerns about voters who cast ballots too early to consider information that becomes available right before an election.[36]

Voting in person is considered by some people to be the quintessential civic experience—physically going to a public place, with other citizens, to cast a ballot in a manifestation of our democratic right to participate in selecting our government officials. Some people oppose mail-in voting—or will not use it—because they see voting in person as the most meaningful and symbolic way to exercise their rights as citizens.[37] Others believe that their mail-in ballots may not be counted—particularly if they are received late in the process and the result of the election is already clear after the in-person votes are counted on Election Day.[13] However, those who remember the gubernatorial election of 2002, among others, can attest

[13] All ballots received and verified as validly cast are actually counted, though the counting of mail-in ballots received just prior to the election, along with other ballots that require verification, can take several days or even weeks after the election. *See* ELECTIONS PROCEDURES MANUAL, *supra*.

that elections are sometimes so close that every last ballot needs to be counted in order to know who won.

But voting in person takes more time, and has to be done on Election Day, which is always a weekday.[38] Employers are only required to release employees to vote if the employee's work hours cover more than 10 of the 13 hours that polling places are open on Election Day.[39] Voters also must vote at the polling place for the precinct in which they live, which may require them to return from work or school.[40]

Arizona polling places are open 6 a.m.–7 p.m. on Election Day, and everyone who is in line at 7 p.m. may stay and vote, even if that takes additional time after 7 p.m.[41] But lines are more likely to be long early in the morning, during the lunch hour, and after business hours, raising concerns that voters will become discouraged and go home. Some advocates suggest extending elections from one day to multiple days, holding elections on weekends, or making Election Day a holiday.

In 2004, Arizona voters added an additional requirement for in-person voting: that a voter present identification establishing that he or she is the person listed on the voter rolls in order to cast a ballot.[42] Unlike the identification required for registration, the voter identification does not need to establish citizenship—just identity. Acceptable forms of identification include government issued identification, mail sent to voters, and documents such as bank or utility statements. Voters who forget their identification can come back the same day to show it at the polling place or go to a special location within the next few days to show identification.[43]

Supporters of the measure say that it discourages and prevents voter fraud and that the variety of acceptable forms of identification makes compliance simple. Critics of this requirement say that there is no evidence of a voter fraud problem and that the requirement discourages and confuses voters and can be particularly burdensome for vulnerable or disenfranchised groups of voters, such as lower-income voters who may move more frequently and may not have driver's licenses or update them every time they move.

Both mail-in ballots and ballots cast on Election Day are subject to strict security measures that attempt to control unauthorized access or ballot manipulation. These measures include locks, requirements that multiple election officials participate or observe counting and transfers of ballots, and provisions for observers nominated by political parties to watch polling place operations and counting procedures.

Arizona uses a form of ballots recognized by many election experts as one of the most error- and tamper-proof methods—the optical scan ballot.[14] On an optical scan ballot, the voter uses a pen to fill in the middle section of an arrow pointing to her selection.[44] The voter does not need to punch any holes (leading to the famous partially punched or "hanging" chads at issue

[14] *Id.* Touch-screen voting machines are available as an option for disabled persons who wish to use those machines rather than obtaining assistance in completing an optical scan ballot. *Id.* No voter is required to use touch-screen voting machines. *Id.*

in the Florida recount in 2000), and the voter herself creates the paper record of her choices (unlike the paper receipts generated by the software of touch-screen voting machines).

Completed ballots are fed into a machine that reads the arrows, sounds an alarm if any sections have been left blank or overvoted (so the voter has an opportunity to correct errors), and then deposits the ballots into a locked box below the machine.[45] If there is a concern about the accuracy of the count, the physical ballots can be fed through another machine for comparison or even counted by hand, thereby providing a way to check for software errors.[46] Nonetheless, many voters are concerned that any system can be manipulated somehow if the stakes are sufficiently high. In addition, many voters do not have a detailed understanding of election procedures, which can also foster suspicion.

If the results of an election are very close—for example, within 50 votes in a legislative race—then the ballots will be automatically recounted.[47] Any voter may also challenge the outcome of an election in court on the grounds of official misconduct, illegal votes, or miscounting of votes.[48]

The U.S. Department of Justice's Voting Rights Division monitors election conduct and enforces the federal Voting Rights Act, protecting voters' rights to register, obtain, and cast a ballot. Arizona is one of a group of states that is subject to special scrutiny under the Voting Rights Act and is required to submit any proposed changes to election laws or procedures to the Department of Justice for review to ensure they don't disenfranchise voters.[49]

Do People Actually Turn Out to Vote?

As of August 2010, there are 3.1 million registered voters in Arizona.[50] They are substantially more likely to vote in general than in primary elections. For example, in the 2008 general election, 77.69% of registered voters cast a ballot, while only 22.8% cast a ballot in the 2008 primary.[51] In the 2010 primary election, turnout was approximately 25.76%.[52]

There are many proposals to increase voter participation and turnout, including encouraging different candidates to run for office, changing how campaign financing works, and adjusting the process or timing of casting ballots.

Some proposals focus on changing the role that political parties play in elections. For example, instead of using party primaries to select candidates to advance to the general election, it is possible to have a primary election for all interested candidates and then send the top few candidates to the primary election, regardless of their party affiliation. California adopted this primary method by popular vote in June 2010, and its effects on voter engagement and turnout will be watched closely over the next few years.[53] Others advocate nonpartisan elections, such as those now required for all Arizona cities, which they contend return the voters' focus to candidates' positions on issues.[15]

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[15] A.R.S. § 9-821.01. This law has been challenged in court by the City of Tucson, which has previously conducted partisan city council elections.

Other proposals focus on changing how votes are counted, in the hope of making voters feel that their votes would be more effective. Most elections in the United States, and in Arizona, involve one- or two-member districts in which the person or two who get the most votes is the candidate who wins. Functionally, this means that a group of voters (of a particular party, ideology, or cultural group) that are fewer than half the voters in a district will have a very difficult time electing a representative the group prefers—even if that group is a substantial minority in the district.

One idea that is popular among academics but has been used in only a few local jurisdictions is "cumulative voting," in which each voter can cast multiple ballots. In a cumulative voting system, if there were five seats on a council, the voter would be able to cast five votes. The voter could spread those votes among multiple candidates, or cast all five for a single candidate, thereby expressing preferences and the strength of those preferences.

This system gives underrepresented groups a higher chance of electing at least one representative of their choice. If the members of the group vote similarly and express a strong preference for their chosen candidate, then even a smaller group can get at least one person elected. In addition, voters' preferences and coalitions can change from election to election, a flexibility not available when officials try to draw district lines so that members of a group can be in a district together.

Another possibility is "instant runoff" or "preference voting," in which voters are asked to rank all of the candidates who are running for a particular office. Votes are then counted in an attempt to maximize all of a voter's preferences; if a voter has ranked someone first who is clearly not going to get enough votes to be elected, then that person's second choice can be counted instead. This system permits voters to vote their true preferences without concern about "wasting" votes, while also considering a more complex set of voter's preferences about candidates other than their first-choice candidate.

Any of these proposals would seem very foreign to voters used to casting a single vote for one candidate from the group nominated by the recognized political parties. The unfamiliarity of these systems has been a source of confusion and resistance in the communities where they have been attempted. However, there is also evidence that these systems do diversify the representatives who are elected and increase voter's perception that they affected the outcome of elections.[54]

Additional Resources for Further Exploration

Arizona's Election Laws

- The full texts of Arizona's election laws are available through the Arizona Legislature's website (www.azleg.gov/ArizonaRevisedStatutes.asp) or in a pamphlet form from the Arizona secretary of state. Some portions of the election laws are also available on the secretary of state's website: campaign contribution laws (www.azsos.gov/cfs/Campaign_Contributions.pdf) and laws governing the initiative and referendum process (www.azsos.gov/election/IRR/Initiative_Referendum_and_Recall.pdf). The

secretary of state's website also includes resources for candidates to use in registering campaign committees and gathering nomination petitions.

- Arizona's *Elections Procedures Manual*, which specifies exact election procedures in detail, is also available at www.azsos.gov/election/Electronic_Voting_System/.

- The Citizens Clean Election Commission oversees public financing available for statewide and legislative candidates. Its website, http://www.azcleanelections.gov/home.aspx, contains guides for participating candidates that describe the public financing system in detail. Its website also contains video files of commission-sponsored debates for each office for which funding is available.

Reports and Information Maintained by Government Agencies About Election Procedures

Various government agencies, commissions, and organizations study and gather information about elections, and can be good sources of information:

- The Federal Commission on Election Reform (sometimes called the Carter-Baker Commission) was charged with examining the conduct of elections and possible reforms, with a particular focus on increasing public confidence in elections. Its full report, with all 87 of the commission's recommendations, is available online at www1.american.edu/ia/cfer.

- The U.S. Election Assistance Commission serves as a clearinghouse of information about elections procedures, at www.eac.gov/default.aspx.

- The National Conference of State Legislatures provides research on policy issues and a forum for the exchange of ideas between policymakers in different states. Their collected information about elections is available at www.ncsl.org/LegislaturesElections/tabid/746/Default.aspx.

Information about Campaign Fundraising and Spending:

- The Arizona secretary of state maintains a searchable database of reports showing funds raised and spent by all political committees, including candidate committees, ballot measure committees, and other groups organized to support or oppose candidates and ballot measures. The database is available at http://www.azsos.gov/cfs/CandidateSummarySearch.aspx.

- The Federal Election Commission maintains a similar website for federal election-related monies, including interactive maps showing campaign finance activities in different states, at www.fec.gov.

- The Center for Responsive Government uses publicly filed information to create its own searchable database of federal campaign spending, which can be searched by

donor name and even by zip code: http://www.opensecrets.org/. Its website also includes information about lobbying expenditures and officeholder financial disclosures.

- The Internal Revenue Service website has information about what nonprofit organizations can do to influence elections: www.irs.gov/charities/article/0,,id=141538,00.html. The IRS also maintains a database with information about the activities of nonprofit organizations that are organized for the primary purpose of influencing elections (called "section 527 organizations"): http://www.irs.gov/charities/political/article/0,,id=109644,00.html.

Historical Archive of Past Election Information

The secretary of state's website also includes archives of the pamphlets distributed to voters with information about ballot measures, along with information about the actual votes cast in candidate and ballot measure elections, organized by election year: http://www.azsos.gov/election/PreviousYears.htm.

Additional Academic and Non-Profit Resources

The conduct of elections is a topic of fascination for many academics, as well as non-profits whose missions include changing elections or informing voters about their rights. Some Internet resources worth exploring include:

- *The League of Women Voters Education Fund*, which distributes comprehensive, nonpartisan information about the voting process and pending ballot issues: http://www.vote411.org/home.php.

- The websites of various organizations that evaluate and/or advocate specific election reforms, such as the American Enterprise Institute (http://www.aei.org/ra/36); the Brennan Center for Justice (www.brennancenter.org/); the Cato Institute (www.cato.org/government-politics); the Center for Voting and Democracy (www.fairvote.org); and the Pew Center on the States (www.pewcenteronthestates.org/initiatives_detail.aspx?initiativeID=34044).

- The blog of Loyola Law Professor Richard Hasen (electionlawblog.org/), which tracks developments in election law nationwide, and "State of Elections" a new project of the Election Law Society at William & Mary Law School, which focuses particularly on state election issues (stateofelections.com/).

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[1] A.R.S. § 16-301 *et seq*.
[2] A.R.S. § 16-301 *et seq*.
[3] A.R.S. § 16-341.
[4] A.R.S. §§ 16-905(N) (permitting unlimited use of "personal monies"); 16-901(18) (defining "personal monies" to include the candidate's own assets and "family contributions"); 16-901 (10) (defining "family contributions" as those received from the candidate's parent, grandparent, spouse, child or sibling, or the parent or spouse of any of those people).
[5] A.R.S. §§ 16-941, 16-945, 16-946, 16-950.
[6] CITIZENS CLEAN ELECTIONS COMMISSION, PARTICIPATING CANDIDATE GUIDE, 2009-2010 ELECTION CYCLE at i (2009).
[7] CITIZENS CLEAN ELECTIONS COMMISSION, PARTICIPATING CANDIDATE GUIDE, 2009-2010 ELECTION CYCLE (2009).
[8] Information about the amounts raised and spent by statewide and legislative candidates is available in a searchable database maintained by the Arizona Secretary of State at http://www.azsos.gov/cfs/CandidateSummarySearch.aspx.
[9] A.R.S. § 16-952; Order, *McComish v. Bennett* (S.Ct. June 8, 2010).
[10] A.R.S. § 16-940.
[11] *See, e.g.*, Allison R. Hayward, *Campaign Promises: A Six-Year Review of Arizona's Experiment with Taxpayer-Financed Campaigns* (Goldwater Institute Policy Report Mar. 28, 2006), *available at* www.goldwaterinstitute.org/Common/Files/Multimedia/935.pdf; UNITED STATES GENERAL ACCOUNTING OFFICE, EARLY EXPERIENCES OF TWO STATES THAT OFFER FULL PUBLIC FINANCING FOR POLITICAL CANDIDATES, GAO-03-453, (May 2003), *available at* www.gao.gov/new.items/d03453.pdf; Laura Renz, *Do "Clean Election" Laws Increase Women in State Legislatures?* (Center for Competitive Politics, August 2008), *available at* www.campaignfreedom.org/docLib/20080826_Issue_Analysis_3.pdf.
[12] A.R.S. §§ 16-905 (setting limits on campaign contributions); 16-901(5)(b)(vi) (defining "contributions" to not include "independent expenditures"); 16-901(14) (defining "independent expenditures" as advocacy for or against a candidate made without coordination with or suggestion by the candidate).
[13] *Id.*; *see also Citizens United v. F.E.C.*, 130 S.Ct. 876, 913-14 (2010); A.R.S. § 16-914.02.
[14] A.R.S. § 16-905.
[15] 26 U.S.C. § 501(c)(3); *see also* 26 C.F.R. § 1.527-6(g).
[16] 2 U.S.C. § 441e.
[17] A.R.S. § 41-1234.01.
[18] A.R.S. §§ 15-511, 15-1408, 15-1633.
[19] *Id.*
[20] A.R.S. § 16-120.
[21] A.R.S. §§ 16-131, 16-140, 16-112.
[22] *Proposition* 200, Arizona Secretary of State, 2004 Publicity Pamphlet (2004), *available at* www.azsos.gov/election/2004/Info/PubPamphlet/english/prop200.htm; A.R.S. § 16-166(F).
[23] A.R.S. § 16-166(G).
[24] DENNIS F. THOMPSON, JUST ELECTIONS: CREATING A FAIT ELECTORAL PROCESS IN THE UNITED STATES 27 (2002)
[25] *See* A.R.S. § 48-305 (weed districts), 48-404(D) (pest control districts); 48-1508 (power districts); 48-1713 (electrical districts).
[26] A.R.S. §§ 16-912, 16-912.01, 16-913, 16-914.01, 16-915, 16-917.
[27] A.R.S. § 16-956(A)(1), (2).
[28] A.R.S. § 18-123.
[29] *Id*.
[30] *See* Voter Registration Counts, *available at* www.azsos.gov/election/voterreg/2010-08-09.pdf.

[31] A.R.S § 16-541 *et seq.*; A.R.S. § 16-561 *et seq.*; *see also* ARIZONA SECRETARY OF STATE, ELECTIONS PROCEDURES MANUAL, *available at* www.azsos.gov/election/Electronic_Voting_System/2010/Manual.pdf.
[32] ELECTIONS PROCEDURES MANUAL, *supra*.
[33] A.R.S. § 16-544.
[34] ELECTIONS PROCEDURES MANUAL, *supra*.
[35] *See* Elections Division, *A Brief History of Vote by Mail*, *available at* http://www.sos.state.or.us/elections/vbm/history.html. Arizona permits mail-only elections for special districts. A.R.S. § 16-558.01.
[36] THOMPSON, *supra*, at 34-35.
[37] *Id.*
[38] A.R.S. §§ 16-204, 16-206, 16-211.
[39] A.R.S. § 16-402 (requiring release of employee whose work hours do not leave three consecutive hours for voting at either the beginning or ending of the voting day).
[40] ELECTIONS PROCEDURES MANUAL, *supra*.
[41] *Id.*
[42] *Proposition 200*, ARIZONA SECRETARY OF STATE, 2004 PUBLICITY PAMPHLET (2004), *available at* www.azsos.gov/election/2004/Info/PubPamphlet/english/prop200.htm; A.R.S. § 16-579.
[43] ELECTIONS PROCEDURES MANUAL, *supra*.
[44] *Id.*
[45] *Id.*
[46] *Id.*
[47] A.R.S. § 16-661 *et seq.*
[48] A.R.S. § 16-671 *et seq.*
[49] For information about the Voting Rights Act and U.S. Department of Justice enforcement and monitoring, see www.justice.gov/crt/voting/.
[50] *See* State of Arizona Registration Report, *available at* www.azsos.gov/election/voterreg/Active_Voter_Count.pdf.
[51] *See* State of Arizona Official Canvass, 2008 General Election, *available at* www.azsos.gov/election/2008/General/Canvass2008GE.pdf; State of Arizona Official Canvass, 2008 Primary Election, *available at* www.azsos.gov/election/2008/Primary/Canvass2008PE.pdf.
[52] *See* results.enr.clarityelections.com/AZ/19539/32173/en/summary.html.
[53] *Proposition 14*, CALIFORNIA SECRETARY OF STATE, OFFICIAL VOTER INFORMATION GUIDE, JUNE 8, 2010 PRIMARY ELECTION (2008), *available at* voterguide.sos.ca.gov/past/2010/primary/propositions/14/.
[54] For a detailed description of these alternative voting systems and the studies of their implementation, see SAMUEL ISSACHAROFF, PAMELA S. KARLAN, & RICHARD H. PILDES, THE LAW OF DEMOCRACY: LEGAL STRUCTURE OF THE POLITICAL PROCESS 1128-1207(3rd ed., Foundation Press 2007).

Concluding Chapter

Summary of Background Papers

The chapters in this background report describe how the institutions of our Arizona government operate and how they influence lawmakers and citizens. Each chapter provides a detailed account of the inner workings of these institutions as well as the author's outlook for the future of Arizona government. What follows is a summary of each chapter and how it relates to the rest of the background report.

This report began with Edella Schlager's chapter on why institutions matter and how they influence the citizens of this state and country. Dr. Schlager provides an introduction to how institutions work and why they are important to study. She provides an overview of how American institutions were developed dating back to the *Federalist Papers*, which builds a framework for how our institutions function today. Issues that James Madison, Alexander Hamilton, and John Jay wrestled with in the *Federalist Papers* are still wrestled with today. How to protect citizens from a tyrannical majority while still maintaining individual liberties, and the influence of self-interest in these institutions are both concerns today much like 200 years ago.

Human nature has always been at the center of the debate regarding institutions, and Dr. Schlager provides an excellent narrative to describe how it affects individual citizens. Like several other authors, particularly Ken Strobeck and Kim Demarchi, Schlager discusses Arizona's Clean Elections law and the controversy surrounding it. She focuses again on how this law influences individuals, while Strobeck and Demarchi focus on how it influences the Legislature and the election process, respectively.

Finally, Schlager discusses reforming our institutional system. She says that there are unforeseen consequences when change happens and most of the time these changes cause some turmoil. She does not say that there should not be any reform; however, we should treat our institutions like experiments and be able to learn from our mistakes.

The logical first step with reviewing institutions is to look at the origin. Just as the U.S. Constitution is the legal foundation for the nation, Arizona's Constitution is the law of the land. From establishing the state's boundaries to delineating each branch of state government, the constitution has provided a framework for our entire way of life in Arizona.

Professor Paul Bender gives an excellent overview of the Arizona Constitution and he provides the introductory background for what many of the other authors in this volume have written their chapters exclusively on. Examples include the Legislature and its salaries from Strobeck's chapter; the election process and how initiatives get on the ballot from Demarchi's chapter; and how the judiciary interprets the laws, which is discussed at length in Paul Julien's chapter. Bender's chapter on the constitution provides the backdrop while the other authors have defined the specifics. Professor Bender discusses the major aspects of the Arizona Constitution. Questions like what do to when the U.S. Constitution overlaps with the Arizona Constitution, and who can initiate a recall election or ballot initiative, are all discussed in this chapter.

Arizona's Constitution states that "all political power is inherent in the people," and this is shown in the initiative process. The people can influence what happens in the state by collecting signatures and allowing citizens to vote on an initiative. The constitution protects the rights of individuals, which goes back to Schlager's chapter and the discussion of protection against tyranny. The preamble of Arizona's Constitution provides for exactly that.

Professor Bender offers a description of how the constitution has been altered—130 amendments since statehood in 1912—as well as the consequences of those changes. For example, originally the Legislature and governor had no power to alter the outcomes of ballot initiatives, but now that only applies when a majority of the registered voters have voted on the initiative.

Bender also discusses how to change the process of election for members of the executive branch. He describes changing the system to having those positions that are not as high profile—mine inspector and superintendent of public education—appointed by the governor instead of elected through general elections and how this will affect citizens. Like Julien, Bender also discusses the creation of the merit-selection system for the judiciary and the breakdown of the different court structures. Finally, Bender, like many of our other authors, looks to what lies ahead for the Arizona Constitution. He poses relevant questions regarding multiple topics from reforming ballot initiatives to term limits and legislative salaries, all with an eye on what the future will hold.

The first branch outlined in the Arizona Constitution, in Article 4, is the Legislature. The Arizona legislative system is a complicated structure that is explicitly explained by Ken Strobeck in his chapter. He outlines the definition of legislative districts, explains why they exist, provides valuable information on candidate eligibility and finally discusses the effects of political polarization on the Legislature and state. Strobeck explains the concept of a part-time citizen legislature and explores its consequences.

Like Schlager and Demarchi, Strobeck highlights the pros and cons of Arizona's Clean Elections law in regard to the legislative branch and discusses the debate about its effectiveness. He also provides a discussion of legislative districts, their controversies and Arizona's mechanism for mapping and drawing districts. In particular, discussion focuses on the issue in Arizona of "safe districts," those that have elections that are not competitive election after election. Districts are created based on Census data, and for the 2010 redistricting, an independent agency is overseeing the creation of legislative districts in the hopes that "safe districts" will be less so. Strobeck ends his chapter with an exploration of the affect of an increase in political polarization in Arizona, including possible reforms.

While the Legislature implements Arizona law, the executive branch enforces it. The relationship between these two branches is closely linked and each depends on one another to serve the citizenry. Professor David Berman offers an overview of the Arizona executive system. Just as Strobeck and Julien provided outlines of the Legislature and judicial systems, Berman gives the reader background of the executive as well as what is on the horizon. There are 11 elected officials in the Arizona executive branch, from the governor down to 5 corporation

commissioners. These offices are independently elected and therefore have responsibilities and are accountable to the voters. Professor Berman also discusses how some of these offices—and the individuals that hold them—have an immense amount of power. This power allows these officials an opportunity to influence individuals and the political system as a whole.

Berman also provides a discussion of the different levels of authority that come with an executive position. For example, the mine inspector is one of the 11 elected officials, but few people know his or her name. This anonymity reduces the level of authority in these offices. While mine inspector may be a relatively invisible office, the more visible the office, the more authority it holds. The governor and the attorney general are prime examples of this.

Professor Berman brings to light one power of the governor that has been in the news recently: the special session. Governors can call the Legislature into special session, which can be cumbersome for a citizen legislature, as Ken Strobeck discusses. The most recent special sessions were on passing the budget and the deficits the state was confronting. Another power that Berman discusses is the power the governor has to introduce or veto legislation, specifically the line-item veto. This is one of the most powerful tools an executive has at his or her disposal, and even the threat of a veto can change the entire political environment.

As many of the other authors have done, Professor Berman gives the reader a look into the future of the Arizona executive and how that affects citizens by looking at Arizona Proposition 111, which is on the November 2010 ballot. This initiative proposes changing the way many of the 11 offices are chosen; as discussed by Bender, the proposition calls for changing from general elections for lower profile offices to political appointments by the governor. The consequences of these changes can be drastic, and Professor Berman gives an excellent discussion of them.

The Arizona judicial system has a long and storied history beginning even before statehood, which Professor Paul Julien outlines in his chapter on the courts. He highlights major advances in our court system, including how active women were, and still are, in the Arizona judiciary. Professor Julien gives a detailed description of each branch of the judicial system, from the Supreme Court to Limited Jurisdiction Courts. In his descriptions he gives the reader a definition as well as who is influenced by the court and how individuals fit into the system at each level. He also offers an overview of what the daily business of the courts is and which level of the system is appropriate for a specific crime or other action.

This leads into a discussion on how important the courts are, not only to interpret the laws, but also as a source of revenue for the state. In economic terms the courts can provide one of the steadiest sources of income, which is helpful during an economic downturn. Another issue surrounding the court system is how judges are chosen for the bench. Professor Julien discusses two methods: merit selection and general election. Merit selection is becoming less and less utilized in favor of elections, which can politicize the otherwise non-partisan judicial branch.

The final section of Professor Julien's chapter is a discussion of how the courts are looking to the future and the Strategic Plan for 2020. This plan has five goals and each of these is defined and outlined, describing how these changes influence the citizenry. In addition, there are several

aspects that the courts are going to have to address as we move to the future including integrating new technologies, maintaining accessibility for citizens in a diverse state like Arizona, and maintaining funding levels to be able to provide the necessary services.

One of the major complications in a federalist government structure is the relationship between levels of government. It is important to understand how state agencies work with counties and municipalities. Intergovernmental relations in Arizona are multifaceted. In her chapter on this topic, Dr. Tanis Salant explores the complex nature of Arizona's political and government systems, revealing an intricate, interlinked web. Our political system is a mixture of many governments where political power is both diffused and shared. But Salant points out that legally, state government supersedes county and local government authority—sometimes causing conflict.

In fact, the debate about where to draw the line regarding state authority over counties and municipalities is a highly debated topic. This subject embodies the push-pull of state-local relations, even though Arizona courts generally limit local power and authority. To even the playing field, counties, cities, and towns have created statewide voluntary organizations to represent their interests at the state Legislature, in the executive office, and with the courts.

Salant argues that fiscal issues related to the allocation of public resources are at the core of intergovernmental relations in Arizona. In order to clarify the intergovernmental relationships throughout the state, Salant suggests examining total public spending in Arizona. The most important thing to look for is which government branches receive benefits and increased funding; this shows what the state government favors. Finally, Salant stresses that even though the state is technically legally above localities, the municipal and county governments play the dominant role in providing services to Arizonans, making them key partners in the success of the state.

Like intergovernmental relations, Native American tribes have complex relationships with local, county, and state governments in Arizona. In her second chapter, Dr. Salant points out that while the federal government's relationship with Native American tribes is defined by the Constitution, states are generally left to define their relationship with tribes on their own—causing some confusion and difficulty. She argues that overall, judicial rulings, federal law, and tribal treaties have kept state jurisdiction on reservations to a minimum—making tribes more autonomous than other governmental organizations within the state.

However, she points out, there are several areas the state controls. Primarily, the state of Arizona controls all criminal and some civil jurisdiction on Native American land. The state also has provided public education and voting rights to Native people in Arizona. Even though there are obvious linkages, state-tribal relations are ever changing and are often complicated. Jurisdictional issues vary from tribe to tribe and issue to issue, and are often still being debated. However, Salant believes that relations between the state and tribes are increasing and one of the major reasons for this is the increase in tribal gaming revenues.

The state has become progressively more connected to the various tribes through two main tribal-state institutions: the Arizona Commission of Indian Affairs and the Intertribal Council of Arizona. Tribes contribute 1–8% of gaming revenues to state and local governments, creating funding for several departments and agencies. This funding stream, which provides resources for a wide variety of projects and grants, allows tribal relations with counties and municipalities to be relatively positive since tribes are contributing revenue for a cash strapped state. In order to more fully understand the complexity of tribal relations to state government, Salant presents case studies on three different tribe types: rural, suburban, and urban. This discussion highlights the major challenges facing each type, along with the unique nature of tribal-state relationships.

Like Dr. Schlager, Kimberley Demarchi points out that elections (an Arizona institution) are always evolving and adapting to the current governmental and political atmosphere. Demarchi delves deeper into the nature of elections in the state, explaining thoroughly the election process. She points out that running for office is generally a long, complicated, and expensive procedure. Campaign finance plays a major role in the success or failure of a candidate; without proper funding a candidate cannot succeed.

Demarchi describes Arizona's Clean Elections Act—believed to be a step forward for election reforms—but also explains that problems with clean elections still remain, and further reforms must be made. Demarchi also champions an informed public and provides the reader with information about where details about candidates can be found. She explains that while information is usually valuable, it needs to be taken with a grain of salt until it is clear who is paying for it to be disseminated.

Next, Demarchi delves into how Arizonans can exercise their right to vote. She presents details about the two options for voters: mail-in ballots and in-person voting. She explores the numerous advantages and disadvantages of each type and produces several ideas for improvements, suggesting there is no solution that will be perfect for every Arizona voter. Furthermore, Demarchi explores the voters in Arizona, not just the process. She surmises that turnout depends on the type of election (general versus primary) and she offers several ideas on how to attract and encourage voters.

Civic Leadership

Engaging voters depends on whether or not a state has civic leadership. In a report prepared earlier this year for the Flinn Foundation, the Battelle Technology Partnership Practice defined civic leadership as:

> the capacity of a community to: identify, analyze, collaborate, and solve pressing societal needs and issues through the efforts of broadly engaged citizen organizations. Implicit in this capacity are two levels of engagement, where citizens with skills and commitment engage with others at the level of a community to address shared problems. Civic leadership requires talent development, organizational structures, and processes that develop and engage emerging and current leaders in community problem solving. Civic leadership

> is exercised by individuals but in a group/community context—local, regional, statewide, and beyond. Civic leadership is exercised by crossing boundaries (private, public, and non-profit sectors).[i]

As Arizona approaches its centennial year of 2012, it is clear that civic leadership in our state deserves greater support. We may be able to easily identify some of the many pressing issues we face—from workforce, taxes, and education, to immigration, energy, and healthcare—but we have struggled to work together effectively enough to unlock these issues' problematic features and find solutions.

If Arizonans are to meet the challenges we face, we must improve our system of preparing future leaders, such that they will have the knowledge, skills, and commitment to work together to devise and carry out long-term, pragmatic solutions to pressing problems. If we do not, the consequence will be diminished quality of life in our state. That is a consequence we cannot accept.

The difficulty that lawmakers have had in reaching common ground on our most urgent problems illustrates well the need to strengthen civic-leadership in Arizona. To be clear, we should expect and welcome impassioned debate over these issues; at its best, debate can clarify issues and help leaders reach broad agreement.

But often, we witness leaders struggling to surmount what Bruce Sievers has described as the problems of collective action and value pluralism.[ii] The problem of collective action, Sievers writes, centers on "the difficulty of achieving collective ends, even when there is common agreement about what those ends are, in the face of individuals' self-interested behavior." The problem of value pluralism concerns "the achievement of common purposes in a world of competing and often incompatible understandings of what those purposes are."

If civic leadership in Arizona is to grow stronger, Arizonans will drive that improvement. Our citizens are certainly dissatisfied enough with the status quo that it seems plausible that they would support leadership practiced in a different way. At the national level, as has been widely reported, confidence in government is at a nadir. The most recent "Confidence in Institutions" poll[iii] by the Gallup organization found that only 11% of Americans surveyed had "quite a lot" or a "great deal" of confidence in Congress, the lowest rating for that institution since Gallup initiated the poll in 1973. The U.S. Supreme Court and the presidency fared better, both at 36%, but each have slipped.

Arizonans have similarly shaky confidence in the leaders of our own state. The Gallup Arizona Poll, summarized in the Center for the Future of Arizona's 2009 report, *The Arizona We Want*,[iv] asked more than 800 Arizonans what single trait was the most important quality in an elected official. The top response, by a substantial margin, was "Understanding of complex issues." The next three responses, closely bunched, were "Commitment to work across party lines," "vision," and "willingness to listen." But are the people of our state getting what they seek in their leaders? Just 10% of respondents rated the leadership of elected officials where they live as "Very good." And only 10% strongly agreed with the statement, "Leaders in my community or area represent

my interest." In this startling dissatisfaction, there is an opportunity for Arizona to experience a renaissance in civic leadership.

The editors of this volume on the institutions of Arizona's government believe two things: first, having well-designed institutions that limit power, promote deliberation, and encourage compromise are extremely important for effective government; second, well-designed institutions are not enough. Well-designed institutions are a necessary but not sufficient condition for effective government.

For legislatures, executive branches, and courts to function effectively, there must be civic leaders who—through work in their communities, in state government, in the business world, and in nonprofit agencies—take the long view of what makes a successful state. This is the necessary condition for effective government.

What this means in practice is that for a state to be successful, there needs to be an educated and engaged citizenry, a sound public infrastructure that supports the economy of the state, and an openness to new ideas and people. At its heart, civic leadership is about stewardship—the obligation of the citizens of the greatest democracy in the world to pass on our state and country to the next generation better than we found them. It should be noted that this view of citizenship has an ancient history; it is embodied in the oath that every Athenian citizen took to pass on the city, not worse but better than he found it.

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[i]Battelle Technology Partnership Practice. "Phase 1 Civic Leadership Initiative: Final Report." March 2010.
[ii]Bruce Sievers. "What Civil Society Needs." *Stanford Social Innovation Review*. Fall 2010.
[iii]Gallup. "Confidence in Institutions." July 2010. Available at: http://www.gallup.com/poll/1597/confidence-institutions.aspx.
[iv]The Center for the Future of Arizona. "The Arizona We Want." 2009. Available at: http://www.thearizonawewant.org/report/index.php.

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1.*	Oct. 1962	Arizona's Tax Structure
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3.*	Oct. 1963	Elementary & High School Education
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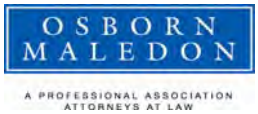

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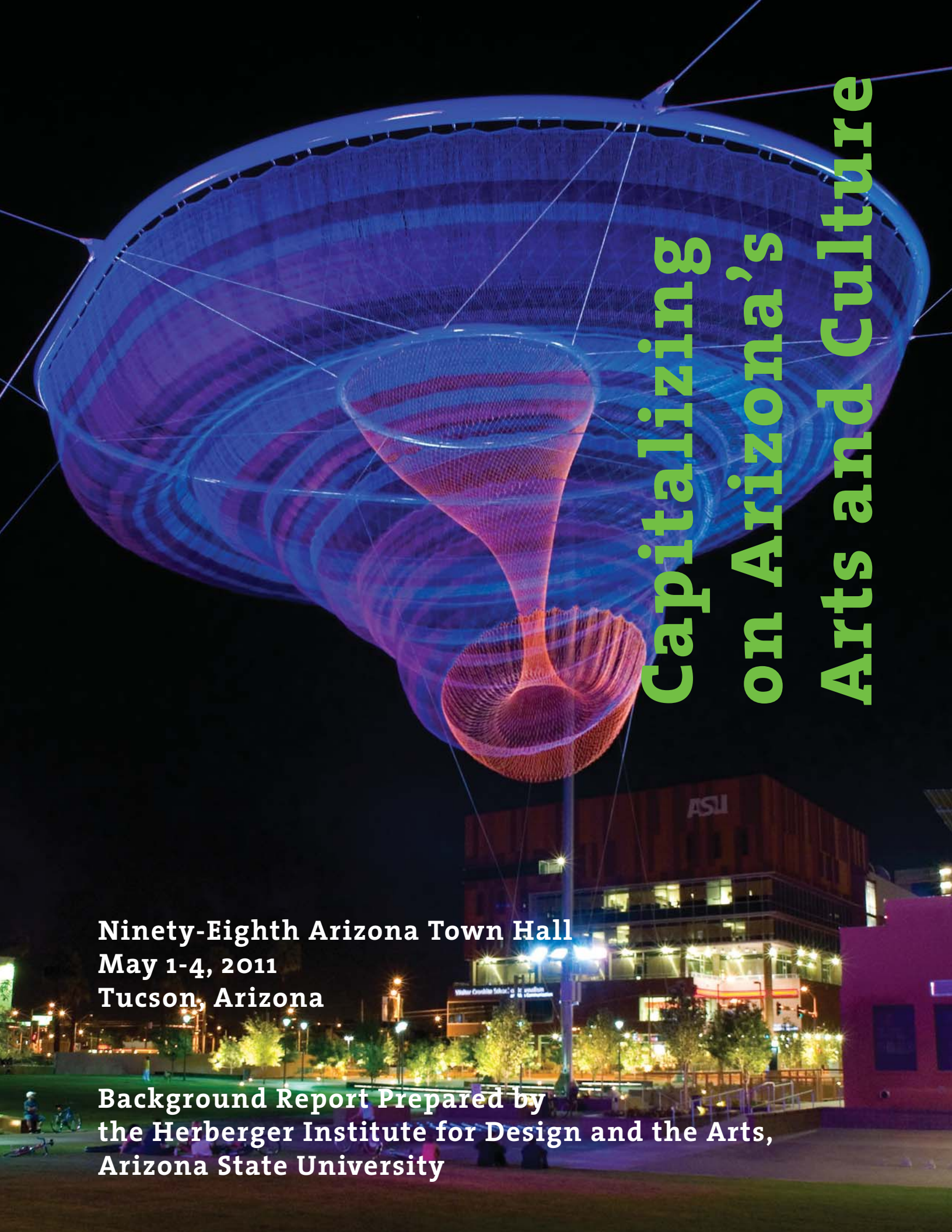

Capitalizing on Arizona's Arts and Culture

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Background Report Prepared by
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July 2011

The 98th Arizona Town Hall convened in May 2011 developed consensus recommendations addressing the ways that Arizona's arts and culture can be utilized to invigorate the economy, education and quality of life. The full text of these recommendations is contained in this final report.

An essential element to the success of these consensus-driven discussions is the background research report that is provided to all participants before the Town Hall convenes. Arizona State University coordinated this detailed and informative background material, and it provided a unique resource for a full understanding of the topic. Very special thanks to the editor Betsy Fahlman who spearheaded this effort, and marshaled a record number of talented professionals to write individual chapters.

The 98th Town Hall could not occur without the financial assistance of our generous sponsors, including Presenting Sponsors Flinn Foundation and Virginia G. Piper Charitable Trust; Collaborating Sponsor Schaller Anderson; Supporting Sponsors Cox Communications and Snell & Wilmer; and Civic Sponsor Perkins Coie Brown & Bain.

The consensus recommendations that were developed during the course of the 98th Town Hall have been combined with the background information coordinated by Arizona State University into this single final report that will be shared with public officials, community and business leaders, Town Hall members and many others for years to come.

This report, containing the thoughtful recommendations of the 98th Town Hall participants, is already being used as a resource, a discussion guide and an action plan for how we can capitalize on arts and culture to improve Arizona's economy, education and quality of life.

Sincerely,

Ron Walker
Board Chair, Arizona Town Hall

The Arizona Town Hall gratefully acknowledges the support of sponsors who understand the importance of convening leaders from throughout the state to develop consensus-based solutions to the critical issues facing Arizona. Our sincere thanks are extended to the sponsors of the 98th Arizona Town Hall.

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Tucson, Arizona
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Report of the

NINETY-EIGHTH ARIZONA TOWN HALL

Capitalizing on Arizona's Arts & Culture

Tucson, Arizona
May 1-4, 2011

Introduction

Arts and culture have been a meaningful part of Arizona since long before statehood, from the rich heritage of the Native American and Spanish cultures that shaped the Arizona experience into territorial days, and the lore of the "Old West," for which Arizona still is known worldwide, through establishment of some of the earliest libraries, historical societies, public art, museums, performing and visual arts associations early in the twentieth century, to the hundreds of organizations of all types located statewide today. Arts and culture are a part of the Arizona experience in almost every community (rural and urban) are a source of employment for many, a source of leisure-time pleasure for many more, a draw for tourism and represent a significant economic state engine. Arts and culture are essential to quality of life.

But what is meant by the term "arts and culture?" For purposes of their discussions, the Town Hall reached for a broad definition designed to include as many constituencies as possible. These include the traditional performing, literary and visuals arts, such as symphony, jazz and popular music, musicals, ballet, modern dance, opera, theatre, art museums, galleries, and new media and electronic art forms. They also include architecture and the built environment, history and historic preservation, represented by examples such as historical museums, archeological sites, and historic buildings, districts and heritage sites. They also include humanities programs as well as programs and places that preserve, honor and interpret our history. Arts and culture include festivals and events that celebrate the lore of the Old West and promote the heritage of Arizona's varied and diverse ethnic groups. Science, discovery and nature are part of Arizona's arts and culture through science museums, children's museums, natural history museums, botanical gardens and zoos. The backdrop for many arts and culture experiences is our climate and geography. The Grand Canyon, the Sonoran Desert, the Colorado Plateau, the various other desert and wilderness areas, and clear skies and mild weather are part of an experience that makes Arizona a special place. Recognizing that sports and sporting events compete with many arts and culture activities for leisure time and dollars, Town Hall felt that they often have differing support systems. For this reason, they were excluded from this definition. The intent was to include all other aspects of Arizona life that reasonably would be viewed as falling under the term "arts and culture."

Beginning with this broad definition and an understanding of the prominent place of arts and culture in Arizona history, and its economy, a diverse cross-section of Arizona residents from various communities and walks of life, all genuinely interested in meeting head on the challenges we face for the future, met as the 98th Arizona Town Hall for three days of facilitated discussions to seek a consensus on how best to capitalize on Arizona's Arts and Culture. This report captures the consensus that emerged from those discussions. Although not every Town Hall participant agrees with every conclusion and recommendation herein, this report reflects the overall consensus achieved by the 98th Arizona Town Hall.

Arts and Culture Arizona Style

Many aspects of arts and culture shape Arizona's people, schools, businesses, economy, governments, and visitors. Equally, the people, schools, businesses, etc., help give shape to Arizona's arts and culture. Some of these aspects are specific to Arizona, including Arizona's natural beauty and temperate climate, as well as Arizona's Hispanic and Native American heritage. Arizona's cultural environment also is shaped by its popular culture, including trading posts, historic Route 66, and cowboy culture as well as contemporary arts, architecture, new media and conceptual arts.

Arizona's arts and culture are not a luxury—they are a money-making and job-producing sector of our economy. Although the recently troubled economy impacts arts and culture, it does not dim the artistic and cultural spirit. Much of Arizona's economy is built around tourism. The strong presence of native and western art and culture within Arizona meets visitors' expectations and provides a solid arts and culture foundation upon which we can build. As Arizona economic development strategies seek to attract knowledge workers, vital arts and culture programs are important to these employees. Importantly, business decisions to locate or expand in Arizona are based in part on Arizona's arts and culture, as well as education—and the importance of these features to employees.

Arts and culture impact how we understand, communicate with, and relate to each other in a civil society. Arizona's arts and culture provide people with quality of life, a common foundation, a social center for connecting with other community members, and opportunities for building community, understanding, and a sense and pride of place.

Preservation and support of Arizona's artistic heritage and cultural activities is important. We also need to encourage developing unique forms of artistic expression, which are not the province of any single sub-group of Arizona's population. Political and cultural tensions can change the artistic environment for better or worse. Some of these tensions include those related to cultural heritage and identity and tensions between rural and urban communities, young and old patrons, traditional and contemporary artistic styles, the desires of newcomers and native-born residents, and gaps between well-funded and underfunded programs.

Arizona can and must do more to capitalize on its arts and culture. Arizona needs to engage, empower, celebrate, and market our arts and culture as much as possible. As noted above, arts and culture are a vital part of Arizona's economy, education, and the shared and individual experiences of Arizonans and visitors alike. Arizona especially needs engaged and informed policymakers who understand and appreciate the economic and social importance of funding the arts. It is imperative that Arizona develop sustainable private and public policies that do not leave support for arts and culture susceptible to periodic changes in leadership and vision.

Different Perspectives from Distinct Communities

Arizona's different regions and communities bring richly diverse, varied and vibrant perspectives and assets to arts and culture. The differences arise out of not only population size, but also location and the diversity of the communities themselves.

Communities that are more remote or that have limited economic resources may have fewer opportunities for access to arts and culture, lack infrastructure, and have a disproportionate dependence on local support. Arts organizations often must cooperate closely with one another to survive. Many rural communities have distinguished themselves and maintained their vitality by capitalizing on their place in history or natural surroundings. For example, towns in the Sonoran Desert and on the Colorado Plateau have captured the mystique of Arizona's heritage, which has helped shape their arts and culture. Some have made arts and culture a focus for the entire community. The border region is heavily influenced by the traditional relationships existing there.

Artists in small communities may be as diverse, modern and innovative as those in large urban centers, but urban areas are better known for contemporary and public art, architecture and artistic diversity. Venues requiring substantial capital investment, such as zoos, naturally develop in places where there are large populations to support them. Arts communities have successfully spurred economic redevelopment in parts of urban and rural areas. Due to the size of the community, there is a tendency in urban areas toward pocketing or isolation of arts communities. There also can be a loss of connectivity, between the arts community and the community as a whole, creating a challenge in raising public awareness of specific arts and culture events. The strength of many communities is the festivals in those communities. Many urban areas are comprised of smaller, distinct communities, separated by faith, ethnic, social, economic or geographic differences, each having its own artistic and cultural heritage.

Arizona needs to do more to promote, encourage and engage our distinct communities of arts and culture throughout the state. This state has an incredibly deep and rich history going back thousands of years, including Native American cultures, Spanish and other European settlements, the Old West, and the Civil War. We also have an incredibly diverse multi-cultural population, the depth of which often is obscured, and we need to make an effort to fully recognize and embrace it.

Artistic talent, ability and interest are not limited to any single demographic. All of the differing perspectives and assets should be promoted, from Native American art in the tribal setting, to rural art in small towns and communities, to the experience of an urban gallery. But current, new, and different forms of artistic expression are to be encouraged. Vital communities can bring diverse populations together for the benefit of one Arizona.

A Diverse Population and Changing Demographics

Arizona's spectrum of arts and culture represents Arizona's diverse population but broad parts of this diverse population currently are not included in the arts and culture experience. There are real and perceived challenges to greater inclusion. Challenges include competition between organizations for funding and other resources, consolidation of arts and culture organizations and the resulting blending of missions, concentration of arts and culture organizations in large metropolitan areas, and simple lack of access for many individuals due to poverty and lack of transportation.

It is important that the leaders of arts organizations be diverse and represent different viewpoints. Arts facilities and performance and exhibit spaces must continue to be made available, affordable, and accessible to diverse groups. Ultimately, we need to develop a critical mass of people with diverse backgrounds, perspectives, and leadership skills to be engaged, provide leadership, and set

policy within our arts and culture organizations. These individuals need to be engaged at all levels—as board members, executives, staff, audience members, and supporters in general. Arizona's arts and culture should be spoken about in ways reflecting the values and heritage of the diverse peoples richly contributing to our society. Arizonans should strive to improve our language that at times fails to show proper respect for all traditions, communities and cultures.

Arizona should focus on better engaging youth in comprehensive arts and culture experiences. Participation in arts and culture programs can be transformative experiences for youth, and can be helpful in developing the next generation for future leadership. Arts and culture programs could more effectively reach youth and audiences by including more robust opportunities for active engagement, and by offering more affordable and accessible programs, including programs and activities taking place during the after-school and evening hours. Social media and evolving technologies are vital to reaching younger generations, but should be employed without sacrificing the humanity of personal interaction provided through other methods of arts and culture engagement.

Technology and enhanced access are critical to meeting the needs of Arizona's diverse populations. We should remember that different groups and generations access arts and culture experiences in different ways and at different speeds. Arts and culture groups experiment with different delivery methods, such as offering different times and places for performances. Additionally, arts and culture organizations are developing different marketing strategies for these diverse population segments in ways that appeal to their distinct preferences.

Arizona needs to recognize how much older adults bring to the arts and culture community. An often younger and more energetic population than historically envisioned, today's "over 50" population seeks new experiences and ways to be actively engaged in meaningful experiences. Arts organizations might increase participation of this population through classes and activities that offer the creation of art in multiple disciplines. Also, as with other age populations, flexible performance times can improve access. This population provides an incredible volunteer base, and it should be noted that grandparents can provide an important bridge to bring arts and culture experiences to youth.

Who Are the Stakeholders, and How Can They Collaborate?

Everyone in Arizona is a stakeholder in Arizona's arts and culture communities. This includes a broad range of individuals, businesses, elected officials, governments, educational institutions, foundations, tourists and other entities. They are the artists and their audiences, the arts organizations themselves, and the directors and officers who run them, donors and others who support them, the business community, students and communities as a whole.

Difficult economic times create a highly competitive environment for all arts and culture organizations. The economy requires that arts and culture organizations work together more effectively. Collaboration is critical. Turf wars can be a challenge. Working together to share ideas is one way to overcome this competition. Expanding the opportunities for artistic and cultural experiences may grow the audience, which may grow support as a whole.

There are many opportunities for improvement. For example, public officials should actively promote and support their respective arts and culture communities. Arizona's currently unsupportive political climate is a barrier to overcome. Presently, many public officials do not

actively promote and support arts and culture communities, and they need to be educated to understand the value of investing in the arts. If that is not effective, we as voters need to replace them. During the election process we need to question candidates on their positions regarding arts and culture. Voters should know where candidates at all levels stand, and base their ballot decisions on candidate support for arts and culture. When elected officials are not receptive, we need to reach out to other stakeholders, increase awareness of what public officials are doing, and work together to share information about their performance.

Arts and culture organizations need to focus more on collaboration and coordinating among themselves. Shared efforts will reduce costs and grow audiences. For example, a performance artist invited to one community or one organization could reach a larger audience if invited to perform in other communities or for other organizations and at a reduced per performance cost to each of them. Organizations that support the arts can be helpful here, but they need greater financial and other support to fulfill their potential.

The economic impact of arts and culture organizations on Arizona's economy is comparable to that of major sporting events. Businesses need to understand how they will benefit from providing greater financial and other support. They have the resources and a stake in the outcome. If businesses understand how they will benefit, greater support is more likely. The relationship is a two-way street. The arts and culture community needs to take responsibility for ensuring that businesses are educated on the mutual benefits of this shared self-interest.

The arts and culture community also must become more effectively involved in the political process, to have a seat at the table when the future of the state, our communities and our people is being decided. Artists and arts and culture leaders should consider using their creativity and leadership skills for public office.

Arts, Culture and the Economy

Arts and culture have a profound impact on Arizona's economy. The arts and culture sector is not just a segment of the economy, or a business—it affects everything we do. Arts and culture tell our story, enrich our lives, and are an important part of life in a balanced community.

The availability of rich and diverse culture opportunities impacts business location decisions and businesses' ability to attract a talented workforce. Arizona's arts and culture drive tourism. The arts and culture sector employs and otherwise engages large numbers of people within our state, including in nonprofit organizations, commercial ventures, educational institutions, and a variety of avocational activities.

The economy also affects arts and culture. It might be said that as the economy goes, so goes funding for arts and culture. However, the news is not all bad. For instance, as the economy struggles, there is more unused real estate. Unused spaces might be put to use to support the housing of artists and their studios and the exhibition of their works, while at the same time ensuring that the real estate and surrounding areas do not suffer significant decay.
There are many opportunities for enhancement, partnership, and mutual support. Actions that could be taken to promote the best short-term and long-term interaction of arts, culture and the economy include:

- Better integrating arts into clinical and other health care settings, given that the presence of art in such settings has a demonstrable impact on patient outcomes, as well as the health industry's profound impact on the Arizona economy.

- Supporting existing organizations within the arts and culture sector, including those that focus broadly on supporting the sector as a whole.

- Marketing arts and culture opportunities on a concerted and collaborative basis, including by promoting existing resources.

- Identifying opportunities for collaboration between existing organizations, including by merging certain functions when desirable to achieve economies of scale.

- Supporting and capitalizing on Arizona's historical prominence in the film industry.

- Designating organizations or individual leaders at the state level to be responsible for identifying and implementing strategies to promote arts and culture.

- Supporting and participating in the Cultural Data Project, which will regularly and consistently collect and analyze data in a standardized system that is shared and demonstrates the impact of nonprofit arts and culture in the Arizona economy.

Supporters of the arts should become politically active and aware and should take steps to increase the likelihood that persons supportive of the arts will be elected to public office. Advocates of arts and culture must speak more loudly, more clearly, and more frequently. Commitment to advocacy should become part of the selection criteria for arts and culture organization board members. Arts advocates must become involved and play an active part in chambers of commerce and other business groups. Arts advocates should have a seat at the table with the new Arizona Commerce Authority and similar local and regional business groups.

Arts, Culture and Education

Education impacts, and is impacted by, Arizona's arts and culture. Arts and culture provide unique educational opportunities, particularly about other cultures. Importantly, there is a positive impact of early arts education on later success in science, math, and other disciplines. There are vast disparities in the funding of arts and culture across Arizona schools. This results in underfunding in numerous schools across the state. This data is supported by the recent Arts Education Census 2009. Many schools are not meeting or enforcing the minimum standards for arts education that are already in place. The standards need to be increased and enforced. Instilling in the next generation an opportunity to think creatively and critically is important for the continued development of Arizona's arts, culture and economy.

A lack of arts and culture education negatively affects the creativity, innovation and academic achievement of our students. The Arizona legislature has severely cut education funding at all levels and for all subjects, forcing schools to place greater emphasis on subjects tested for AIMS, such as reading, writing, math and science. Subjects involving arts and culture activities are de-emphasized. This has a negative effect on essential skills that impact student learning in other areas and denies them a valuable learning opportunity in their youth.

National and state foundations, as well as civic and education leaders, have placed greater emphasis on subjects such as science, technology, engineering and math ("S.T.E.M."). S.T.E.M. has been defined as the core underpinnings of an advanced society. We need to include the arts in that definition. We need S.T.E.A.M., not S.T.E.M. Arts education is a core academic subject and, as such, is integral to every student's education. Creativity, often learned by studying the arts, is a key to success in other areas, such as science and business. For some children, classes emphasizing arts and culture may be the incentive they need to remain in school.

Many of Arizona's political leaders do not value arts and culture as part of a core curriculum. Until this changes, Arizona will de-emphasize arts and culture education. Accountability starts at the legislature and the Department of Education, but they will not change without input from others. Arizona residents need to speak up, stand for what we support, and make that support known at the ballot box at all levels, from the legislature, to the superintendant of public instruction, and to local school boards.

The arts and culture community should partner with the business community to lobby for improved arts education. The benefits of a well-rounded curriculum, including arts and culture education, are too many to ignore. Arizona residents need to fully understand the impact of arts and culture on the community. Supporters should bring the issues to the forefront of public policy discussions and seek flexibility at the local level for schools to accommodate all subjects within their budgets. Nonprofit organizations and arts professionals should continue augmenting arts education in the schools. Artist residences, school field trips to libraries, museums and other arts and culture institutions compliment instruction. Bringing the arts from the community into the schools may also be an effective strategy. Educators also can be instrumental in this process, but they need support from policymakers. In this way, students will benefit from direct exposure to artists and their art, and arts and culture activities can be an important compliment to the core curriculum.

Health, Well-Being and Quality of Life

Arts and culture impact the health and well-being of Arizona residents and visitors. Arts experiences can positively affect one's health. As studies and clinical experiences show, the presence of art in health care settings has a demonstrable impact on clinical outcomes, including fewer prescriptions, fewer doctor visits, and fewer hospital visits. The presence of arts and culture programs in schools positively impacts students' health, attendance and engagement. Art and culture are integral parts of healing and therapy.

Arts and culture also contribute to the quality of life of Arizona's residents and visitors, contribute to a sense of community and a sense of place, and make us feel like a part of something greater. Arts and culture foster connection, stimulate dialogue, and unite us to achieve common goals. Arizonans should do more to help arts and culture institutions develop strategies to expand their audiences and impact our communities. Examples of how they might do this include:

- Health care communities should be encouraged to enhance their support for arts and culture by, among other things, setting aside funds to invest in arts.

- Arts advocates should consider the potential for alliances with religious organizations that already incorporate art, music, dance, and other artistic and cultural activities into their activities and services.

- Arts advocates should develop partnerships with already funded entities, such as Health and Human Services, Housing and Urban Development, and the Department of Transportation.

- Governments, state and local, should provide incentives, such as the percent for art program that promotes arts and culture.

- Arts and culture should be considered in land-use master-planning processes, such as art development ordinances, as well as the scoring criteria for tax credits, grants, LEED certification, and other relevant allocations of resources.

- Arizona needs to expand, better utilize, publicize and adequately fund showup.com, the existing statewide calendar of arts and cultural events.

- We should bring arts and culture to places where people already gather or create mixed use spaces, for instance venues that combine cafes with musical or other cultural experiences, or bringing concerts to libraries and museums and malls.

- The health of artists should be protected by wider efforts to make health insurance affordable and accessible to the sole proprietors and small businesses that comprise the vast majority of practicing artists.

Promoting and Advocating for Arizona's Arts and Culture

Many Arizona residents do not understand the full impact of arts and culture on education, the economy and their quality of life. Still others take for granted, or are simply unaware of, the role that arts and culture play in their lives, and how arts and culture can enhance their lives. Based on the actions of voters who have approved bond elections to establish and continue arts and culture programs and facilities, Arizona residents are more progressive, have a better understanding of the arts and culture, and are far more willing to support them than the legislature. But the voters' values in support of arts and culture often are not reflected in their decisions on which candidates they support for public office.

We cannot wait for elected officials to change. We must work to change elected officials. Education of the general public is one answer to the question of improving Arizona residents' understanding of the impact of arts and culture on education, the economy and their quality of life. The arts and culture communities need to take matters into their own hands to do this work. People need to know and understand the history of arts and culture in Arizona and how that history impacts what is happening today. Arts and culture serve a public good beyond just our individual experiences. Education will raise awareness of their statewide importance.

A statewide campaign to promote Arizona's arts and culture and their economic value should be comprehensive, sustained and targeted. Use of the media (including traditional and social media) and taking advantage of opportunities through media and other partners is important. Supporters should not hesitate to publicly correct errors and attacks directed at arts and culture.

Arizona's culture is one of rugged individualism and great possibilities. As we teach Arizonans about our arts and cultural history, we can build a sense of pride in the state's arts heroes who reflected this spirit and thrived on it. The goal is to keep the message personal, simple and direct to get the public engaged and supportive of arts and culture on an ongoing basis.

The economy is a challenge. Diverse groups have their own stories, priorities and self-interests. They face tough choices, and arts and culture programs often lose when something needs to be cut. Therefore, we need to collaborate with other groups threatened by cuts and work toward true fiscal reform that provides adequate funding for all of our state's needs. Those promoting programs need to figure out how to reach people with arts and culture and make a connection. For example, getting children involved not only will enhance their education, but also can be a tool to reach out to their parents and families. These personal relationships can be used to create connections between people. In particular, youth at risk can benefit from art programs and the connections that flow from them.

The Impact and Opportunities of Market Forces and Private Enterprise

Dynamic market forces play a significant role in the arts and culture sector. These market forces include, among other things, fluctuating economic trends, changing demographics and evolving technology.

As government and philanthropic support has eroded, arts and culture institutions have become considerably more market sensitive. Many have experienced pressure to generate more earned income and, in some cases, become entirely self-sustaining. This pressure presents opportunities, but also creates serious creative and other risks. For example, arts organizations must ensure that their missions do not get lost in the pursuit of resources and funding. Arts and culture institutions may mitigate such risks by developing and actively marketing programming that includes both presentations that have broad audience appeal and more edgy presentations that do not have the same mass appeal.

Arts and culture institutions can capitalize on the opportunities presented by market pressures by recognizing that they are fundamentally similar to other business sectors in many respects.
There are many opportunities for improvement in the marketing of arts and culture. For marketing purposes, arts and culture organizations need to understand why their patrons participate in their programming. Further, there are opportunities for arts and culture institutions to be more creative and demonstrate their relevance through product differentiation and other strategies. There are also opportunities for stronger collaborative partnerships between the arts and culture sector and businesses and other sectors. For example, a lunchtime restaurant may be willing to stay open for extended hours when a nearby theater is offering programs. A shared understanding and appreciation of, and respect for, the assets, skills, perspectives and challenges of all partners is essential for partnerships to maximize these opportunities and "increase the size of the pie." However, collaboration must be mutually beneficial.

Examples of innovative and collaborative partnerships that either have proven or could prove successful include:

- Developing special arts districts and neighborhoods that create a necessary critical mass of customers to support a market for arts-related businesses.

- Establishing community art walks.
- Making available the temporary use of unoccupied retail space for art displays and galleries.
- Encouraging adaptive reuse of existing structures for arts and culture facilities and the involvement of neighborhoods in place-making centered around arts and culture.
- Installing rotating displays of art in businesses and other public places.
- Sharing performing arts and other facilities with other organizations during "off" times to generate additional revenue.
- Developing rosters of artists to be provided to developers, builders, homeowners, and municipalities to facilitate the inclusion of public art in building projects.
- Encouraging artists and businesses to share skills and talents. Arts groups are often small, underfunded, and inexperienced in management and would benefit from the availability of low-cost training, expertise and guidance in those areas. Additionally, the donation of in-kind services or lower cost services represents an area of opportunity.

Philanthropy

Historically, private philanthropy has played a role in supporting and funding arts and culture in Arizona. A widely engaged and deeply invested philanthropic community is central to a vibrant arts and culture community. Some Arizonans give generously, usually for the benefit of organizations with which they have a strong personal connection. There are few statewide philanthropic foundations in Arizona. Although there are national-level foundations, it is challenging to even get their attention. Arts and culture organizations thus rely more on local philanthropy, including individual donors. The economic downturn further limited the pool of funds available and, in many cases, pushed arts and culture to the "bottom of the barrel," as some philanthropists turned their focus to basic human needs and other causes. We recognize that the arts and culture also are basic human needs.

Like politics, art support is local. Sustained philanthropic giving requires understanding, a thoughtful approach and follow-up. Engagement of key corporate decision makers is critical to securing corporate donations. Because few large corporations are headquartered in Arizona, corporate support for arts and culture in Arizona is more limited than in many other "headquarters" states.

The number and size of private foundations and philanthropic organizations located in Arizona that are dedicated to funding arts and culture is likewise limited. Some communities have no large foundations for this purpose. Other areas are competing for the same dollars, which are a diminishing resource.

Arizona has a significant population of retirees who moved here from other states and individuals who maintain homes here but consider their primary residence to be located elsewhere.

Both groups tend to provide philanthropic support to arts and culture organizations in their home states, and often are less inclined to give in Arizona.

Outreach at all levels is key to meeting the challenges associated with private philanthropic funding of arts and culture. Arts and culture organizations need to increase the sophistication of their fundraising efforts. Over the long term, arts and culture organizations need to demonstrate the value of investing philanthropic dollars in arts and culture. Training and educating people in arts and culture when they are young will let them see the value of arts and culture, making them more likely to give. Similarly, organizations should provide opportunities for young people to become involved in leadership positions for the purpose of nurturing this demographic as donors.

In the shorter term, seeking smaller philanthropic gifts from many donors actually may be more beneficial than going after one large gift. This strategy will cause many more people to become engaged, involved and invested. Small gifts also could be used later to leverage larger resources. Contributions on such a scale could be encouraged through state and federal tax incentives.

Volunteering is an important aspect of private philanthropy. Arts and culture organizations should use resources that efficiently join a supply of available volunteers having expertise with those organizations who demand it. Such resources are an important clearing-house function that would eliminate inefficiency and maximize private philanthropy. Grants and donations are not always free money. Often these gifts come with strings attached. Many funders will provide only seed money leaving the recipient struggling to finance ongoing operations. Businesses can provide people to serve on arts and culture boards and as volunteers, which benefits the corporation by enhancing the skills of the employees and contributes to employee retention.

Although they tend to give in their home states, Arizona part-time residents and visitors have incredible wealth. Arts and culture organizations need to devote resources to convincing these individuals to add Arizona organizations to their philanthropic giving. Focusing on the baby boomers and their heirs to establish advanced-planned giving for the benefit of arts and culture also is an important strategy.

There is a need to be creative in keeping the arts and culture message in front of the targeted philanthropic audience. Direct mail may be best for some. Phone calls may work for others. New technology, such as texts, tweets or even email may work best for still others. In all cases, personal relationships are key. Once the means of communication are identified, the story must be told in a way that is compelling to the audience.

Government Support and Funding

Arizona government traditionally has supported arts and culture programs and organizations. Financial support practically has disappeared in recent years. Presently, Arizona government funding for arts and culture is wholly inadequate. The general appropriation for arts and culture trails every other state. State funding for the arts and culture at the low current levels is simply unacceptable.

Arts and culture voters must advocate for the idea that public funding for the arts and culture is both possible and desirable. Government funding of arts and culture is statistically insignificant

as a percentage of the state budget, but it is the first to go when economic times are tough. This is short sighted and overlooks the fact that arts and culture yield real economic and other returns that more than justify the investment.

Arizona needs to develop more stable and diversified sources of funding for arts and culture. Government funding is critical to address geographic disparities, differences between rural and urban areas, and private sector preferences. Examples of how Arizona might achieve more stable and diversified funding of arts and culture include:

- Implementing a dedicated funding source that benefits arts and culture.
- Restoring funding to the Arizona Commission on the Arts and empowering it to oversee the allocation of funds to arts and culture institutions.
- Educating elected leaders and candidates about the tangible benefits associated with arts and culture and identifying and supporting candidates for elected office who will champion arts and culture.
- Supporting existing and creating new private foundations/endowments for Arizona's arts and culture.
- Encouraging local elected officials to support private-public collaboration to support arts and culture and pursue zoning improvements.

Maximizing and Better Utilizing Available Resources

The most powerful method for maximizing available resources is to build robust arts and culture networks to share information and coordinate efforts. These networks may consist of partnerships among the organizations themselves or umbrella organizations, such as arts councils formed to act as a resource for consolidation. The value of a network increases with each additional participant. Commonalities can be identified to increase efficiency. Organizations are filled with creative people who should be leading the nation in the development of innovative ways to finance their activities.

Many arts and culture organizations share common functions, often not apparent to patrons, where consolidation would let them pursue efficiencies. Examples of these include accounting, human resources, insurance, list management, purchasing and other back-office operations. Networking and pooling of resources would allow each group to reduce its overall costs and provide valuable resources to employees. Where there is duplication and competition for funding resources, partnerships, alliances and mergers should be considered. Arts and culture organizations cling strongly to their individual identities and may find consolidation of some operations threatening. For this reason, the involvement of a third party, such as an arts council, may be warranted to facilitate consolidation. Mergers of organizations that have different missions, cultures and practices may be difficult to engineer and ultimately may not be successful.

The business community is another potential resource for improving efficiencies. Businesses can donate office supplies and equipment, the time of their executives and skilled employees, office

space and training for employees of arts and culture organizations. Volunteers and their time reduce the need for reliance on funding organizational operations. Businesses, property owners, government entities and schools have vacant or surplus properties that could be made available for use by arts and culture organizations. Space in occupied properties owned by these entities, and by religious organizations, could be offered for use as venues for art exhibitions or other programs. Other innovative revenue enhancement or cost cutting measures include naming rights campaigns, marketing campaigns that raise awareness of and support for arts and culture, free or discounted tickets to build patron loyalty and interest, "rounding up" and point of sale donation programs, employment of student artists as summer interns, and continued investment in internet based and social networking tools to market themselves, and to connect with one another and with funding resources. Organizational representatives should become familiar with the tax incentives and bond programs available and work to further and promote them.

Priority Actions

It is the role and responsibility of Arizonans to ensure that the actions identified in this Town Hall report are implemented by supporting Arizona's arts and culture communities. The following actions, listed in no particular order, must be taken immediately or in the very near term:

- Restore appropriations and the arts endowment to the Arizona Commission on the Arts and expand the role of the Commission to include cultural organization with additional appropriations.

- Dedicate a seat on the Arizona Commerce Authority for arts and culture. Urge statewide advocacy groups to establish a legislative priority to secure this seat by amending the existing statute.

- Increase statewide campaigns to raise awareness for the value of arts and culture and increased participation. These campaigns should be executed with sufficient resources to maximize their effectiveness and should be led by a marketing alliance of arts and culture groups. As participation precedes support, we must start now.

- All schools must adhere to the existing state standards and policies that apply to arts curriculum. The Superintendent of Public Instruction must enforce this provision. To accomplish this goal we must advocate that local school officials place arts specialists in all schools and provide adequate funding to meet the standards.

- Arts and culture organizations should work with education stakeholders to advocate for a statewide mandate for the recurring collection of arts education data from schools, using the model and best practices evident in the 2008/2009 voluntary arts education census.

- Parents must be involved in their children's art education so that they are engaged and invested in that education. Arts and culture organizations should reach out to parents and encourage them to be involved in their children's arts education, taking an active role in assuring the enforcement of state standards and policies being implemented.

- Arts organizations should sign up for and participate in the Cultural Data Project and the Arizona Community Database.

- Individuals and arts and culture organizations should immediately implement a variety of grassroots efforts, including networking, enlisting the support of others, contacting public officials, attending Arizona Town Hall outreach sessions and advocating for implementation of this report.

- Convene a broad-sector coalition to develop a statewide quality of life ballot initiative to provide a dedicated funding source for arts and culture that cannot be diverted or reduced through legislative action.

- Ensure that Arizona's arts and culture are represented in any celebration of the Arizona Centennial.

- Convene a consortium of the arts and culture stakeholder communities to form an overarching collaboration alliance for purposes of statewide data policy, support, development and awareness. The state's primary arts-supporting foundations are a logical choice to facilitate this summit.

- The Arizona tourism industry and arts and culture organizations should increase their partnerships and collaborations to raise the profile of Arizona's arts and culture sectors when marketing Arizona as a visitor destination.

- Identify and encourage diversity in arts and culture organizations.

- In order to provide more public and private support, grow philanthropy to support Arizona arts and culture.

- Authorize and fund a study defining and measuring the total Arizona arts and culture economy, expanded to include traditional nonprofits, education K-G (Kindergarten through Graduate), and art and design-based business enterprises.

- The arts and culture community should utilize their existing statewide arts and culture advocacy groups such as Arizona Citizens in Action for the Arts to organize a political action committee, which will receive contributions and make expenditures for the purpose of influencing elections at all levels and advancing the statewide arts and culture agenda.

- Identify and utilize online interactive resources that would allow the various groups to share valuable information about resources and opportunities for alliances.

The following actions must be taken, in no particular order, over a longer period, starting now:

- Identify, support and elect political leaders and candidates who will champion the cause of the arts and culture, from the legislature to the city councils to the school boards.

- Collaborate with education, health and human services, and other groups threatened by cuts to enact true fiscal reform (including closure of tax loopholes) to ensure fair, adequate, and sustainable revenues to support all our state's needs including arts and culture.
- Arts and culture organizations and artists should collaborate and partner with other public groups, such as hospitals, educational institutions, tourism boards, and religious and civic groups in order to expand the resource pie.
- Arts and culture organizations should continue to collaborate and partner among themselves to share resources, such as marketing and audience development efforts.

- Expand S.T.E.M. to S.T.E.A.M. by adding arts into the core educational curriculum.

- Arts and culture organizations will have a more impactful voice when their value message is unified and substantiated by reliable research.

- Arts and culture organizations need to have a seat at the table with local chambers of commerce, business organizations and economic development organizations to build vitality and long-term relationships.

- Arts and culture organizations and their allies should bolster existing lobbying efforts.

- Arts and culture organizations should work with regional planning organizations and the League of Arizona Cities and Towns to develop model ordinances and policy that support the arts.

- Full and part-time residents need to become members of arts and culture organizations and commissions, and actively support them, financially, by volunteering their time, and by attending their functions and events.

- Require public art as an element of government buildings and infrastructure. Local governments should enact land use codes that provide incentives for developments that include public art.

- Identify and engage new and emerging leaders in arts and culture.

- Create models to reach young and modest givers who may become long-term sources of sustainable financing for arts and culture.

- Arts and culture organizations should make it a policy to identify, encourage and publicize emerging individual artists, artist teams and art groups.

Individual personal responsibility is critical for the future of arts and culture in Arizona. Whether they act individually, in partnership with others, or through businesses, governments, nonprofits or other organizations, individuals must take responsibility for preserving, improving and growing arts and culture in Arizona.

NINETY-EIGHTH ARIZONA TOWN HALL
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Capitalizing on Arizona's Arts & Culture

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The Heritage

Carole Jarvis
c. 1985

Four generations ranched this land,
Two are buried here.
Wood and stone still mark the place
They've rested through the years.

Grandpa brought his new bride
A century ago,
To homestead on the bottomlands,
Where clear sweet waters flow.

They raised three boys to manhood,
But one went hunting gold,
Another left to serve the Lord.
Just one stayed in the fold.

In time that one son married
A girl named Emily.
They built a home and raised for kids,
And one of them was me.

We grew up knowin' cattle
From their bawlin' to their brand,
And Dad instilled his rancher's pride
And feelings for the land.

Keep the fences mended,
Give your best, was what he asked.
Never break another's trust
Or let an anger last.

Hard work was just one measure
Of how he judged a man.
If his horse had 'saavy',
What kind of bulls he ran.

Mama had her own ideas,
But seldom made them known.
Her time was mostly occupied
In managing our home.

And I guess we took for granted
Our life out on the range,
But we grew up and they grew old,
And things began to change.

Destiny, it seemed, had plans
That no one could foresee.
My sister moved away to teach,
John died at Normandy.

That left Justin and myself
Who made the choice to stay,
And we were living on the ranch
When both folks passed away.

Though the world and times keep changing,
The cows still wear our brand,
And our kids grew up on horseback,
And learned to love this land.

We're a family grateful for this life,
And what freedom it still allows.
Each generation passing on
It's heritage of cows.

Chapter 1

Art Galore for the Capital

Betsy Fahlman
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Key Points

- Federal funding for the arts in Arizona began in the 19th Century
- The tourism industry used the arts as a key element in marketing the West
- Arts and culture remain significant economic engines in Arizona

The Arizona Town Hall and Arts and Culture

The 98th Arizona Town Hall on "Capitalizing on Arizona's Arts and Culture" represents the first time the Arizona Town Hall has focused on this important topic since its founding in 1962. The subject has been included in several previous background reports, but only as an adjunct to larger issues.[1]

When I arrived in Arizona in the summer of 1988 to take a position at Arizona State University, I discovered an arts community poised for expansion (public art played a key role in this development), matching the state's vigorous economic growth. But until that happened, it was common to hear an old joke: "What's the difference between Phoenix and yoghurt? At least yoghurt has culture."

The authors and topics contained in the 98th Arizona Town Hall background report reflect a radically changed and expanded cultural climate since the eighties, though one facing considerable economic challenges. *Capitalizing on Arizona Arts and Culture* is a comprehensive document comprised of many more essays than previous reports, presenting a range of voices, issues, and topics in order to convey an in-depth understanding of the state of the arts in Arizona, as well as the most important issues facing this community. The linked themes that run through this report are the close relationship between the arts, education, and economic development.

Defining Arts and Culture

A broad definition of arts and culture as exemplified in the institutional missions of those who have contributed to this background report has been adopted in order to give readers the broadest foundation for a lively and productive dialogue from which informed policy recommendations may be made. Sports have not been included as it was felt that they would make the report too broad to be useful. Sporting events have their own logic and base, and function in a completely different economy, though one that also competes for the leisure dollars of Arizonans.

The performing, literary, and visual arts form the heart of what has been traditionally defined as Arizona's nonprofit arts sector. This category includes the symphony, ballet, opera, modern dance, art museums, theatre, chamber music, literary magazines, musicals, the visual arts, galleries, reading groups, and jazz, as well as a lively popular culture that embraces a wide range of new media and electronic art forms. History and preservation are also important, and Arizona's many stories are told by its historical museums, archaeological sites, heritage programs, and historic buildings and districts. Arizona has celebrated the arts and humanities in festivals and events that promote the culture and history of the American West and highlight the state's diverse ethnic groups. Science and nature are presented in our natural history and science museums, and botanical gardens (some of which have arts programs). The state's landscapes and natural landmarks have contributed to its distinct regional cultural identity. The desert environment and wilderness areas, including the Sonoran Desert and the Grand Canyon, add a unique dimension to residents' and tourists' experiences. All of these represent significant economic engines for the state.

A Short Lesson in Arizona's Art and Cultural History

Since the nineteenth century, painters and photographers have traveled through Arizona, though the resident arts community was small until the mid-twentieth century, and one in which women outnumbered the men. Declaring oneself an artist took fortitude, as painter Maynard Dixon, a regular visitor to the state, recollected: "In those days in Arizona being an artist was something you just had to endure—or be smart enough to explain why."[2] There were no art schools where aspirant artists could seek training, and exhibition opportunities and collectors scarcely existed. An ambitious artist stood a far better chance of critical and economic success in California or New Mexico, where there were the requisite support systems for art production—galleries, museums, patrons, and art schools.

Arts and culture gradually took root in this desert state faced, and faced daunting challenges in the early years of the twentieth century, especially as Arizona offered an artist few of the advantages found in its neighbors to the west and east. California promoted its romantic Spanish heritage, and it was there that the Mission Revival began, its allure bolstered by popular Hollywood movies. But it was New Mexico that capitalized most extensively on its distinctive regional culture, fostering the development of a thriving tourist industry. The writers who created a national image of the Southwest with their evocative literary portrayals were comfortably situated in the art colonies of Santa Fe and Taos, places with many amenities for visitors. The early Spanish land grant families retained a powerful presence in that state, and the intertwined ambience of Indian and Spanish culture was irresistible to tourists. The fact that the New Mexico pueblos are relatively close together made them readily accessible to both tourists and artists. Spanish and Pueblo revival styles were officially adopted by Santa Fe's leaders in the teens, making it a kind of cultural theme park. In contrast, the Navajo settlements in Arizona were spread out over a broad geography, and the Hopi mesas were hard to get to and offered few comforts to visitors. Nothing like the concerted effort of cultural marketing that developed over time in New Mexico existed in Arizona.

Arizona's first artist-visitors were dazzled by the state's geographically impressive landscape, while others sought inspiration in the rich heritage of the region's Native American culture. The paintings and photographs they produced helped define the state's national image to those unable to travel to the far West. From the start, art and economics were intertwined in Arizona. Beginning in the middle years of the nineteenth century, government-sponsored surveys of the American West charted potential mineral wealth and railroad routes with future expansion and development in mind. Artists were important participants in these efforts.

At the turn of the twentieth century, art was strongly linked with the expansion of facilities at the Grand Canyon. The site of the state's only well-developed tourist industry, it was established as a National Park in 1919.[3] Painter Thomas Moran visited Arizona in 1873, and the magisterial canvas that resulted from his first trip was purchased by Congress for $10,000. The many artists who followed him were among the chief factors in making the state's signature landscape feature "grand." The handsome "parkitecture" by Mary Jane Colter further contributed to its becoming a mecca for tourists eager to experience the ethnic and scenic richness of northern Arizona. The Fred Harvey Company, which formed a partnership with the Santa Fe Railway, operated restaurants and luxurious hotels throughout a system that stretched from Chicago to Los Angeles, including El Tovar on the South Rim. To promote things to see along its routes, railroad officials began assembling America's first corporate art collection in the 1890s, and, together with the Fred Harvey Company, assiduously marketed the southwestern experience to visitors.

The Old West is still celebrated throughout the state, exemplified by dude ranches, cowboy poetry gatherings, and chuck wagon cook-offs. The Phoenix Art Museum hosts an annual exhibition of work by members of the Cowboy Artists of America, a group founded at a bar in Sedona in 1965. For more than fifty years, the Hashknife Pony Express has made an annual mail run from Holbrook to Scottsdale (whose moniker is the "West's Most Western Town") to kick off the Parada del Sol. In Wickenburg, the Desert Caballeros Western Museum annually hosts "Cowgirl Up!" This exhibition of contemporary western women artists draws visitors from all over America.

Important institutions were established in Arizona well before statehood. The Arizona Historical Society was founded in 1864, and the Copper Queen Library (1882) in Bisbee, remains the oldest library in the state. A public library opened in Phoenix in 1898, and Carnegie Libraries followed in Tucson (1901), Prescott (1903), and Phoenix (1908).[4] These institutions were important cultural centers in the communities where they were located, but geographical distance limited a sense of state-wide connection. Before statehood, the arts were a rare commodity in Arizona and it would be a long time before Culture took its place beside the "five Cs" that are the historic foundation of Arizona's economy—Copper, Cattle, Citrus, Climate, and Cotton.

The first significant act of public arts patronage in Arizona came at statehood when Lon Megargee was commissioned to paint fifteen mural-sized canvasses for the State Capitol.

The artist was paid $250 apiece, receiving a total of $4000, and the *Arizona Republican* celebrated the fact that there would be "Art Galore for Capitol."[5] Megargee's themes parallel the iconography of the state seal, and broadly summarize the visual culture of Arizona at statehood, encompassing its spectacular landscape and natural wonders, the structures and customs of its indigenous Native American peoples, artifacts of Spanish Colonial settlement, and the agriculture, mining, and ranching that sustained its early settlers. These remain elements still promoted by the state's tourism industry.

Exhibition venues and patrons were sparse in the early years of statehood. The state's first annual art exhibition commenced in 1914, and was held not in a museum, but was at the Arizona State Fair. Its sponsor, the Women's Club of Phoenix, purchased one work annually for the city's municipal collection.

The twenties witnessed a flurry of civic cultural activity, mostly centered in the capital. The Phoenix Little Theatre (now the Phoenix Theatre) was founded in 1920, and is the oldest arts institution in the state. Three years later, in 1923, the Arizona Museum of History (now the Phoenix Museum of History) was founded, opening in 1927. Dwight and Maie Heard established the museum that bears their name in 1929. Artists' groups included the Phoenix Fine Arts Association (1925) and the Arizona Artists' Guild (1928). Outside of Maricopa County, the Tucson Fine Arts Association (now the Tucson Museum of Art) had been formed in 1924, the Temple of Music and Art opened in 1927, and the Tucson Symphony Orchestra gave its first performance in 1929. In Flagstaff, the Museum of Northern Arizona was established by painter Mary-Russell Ferrell Colton and her husband Harold in 1928, the same year Sharlot Hall opened her museum in Prescott to the public. The stock market crash of 1929 must have made the economic prospects of these fledgling groups seem uncertain at best.

During the Depression years, the federal art programs established by Franklin Delano Roosevelt's New Deal benefited the state. Post Office murals were commissioned for Phoenix (1938), Springerville (1939), Flagstaff (1940), and Safford (1942). With the Miners' Monument (1935) in Bisbee, these remain among the tangible artifacts of the Works Progress Administration's (WPA) cultural support in Arizona. The Phoenix Federal Art Center opened in 1937, and WPA programs funded projects to record cultural heritage throughout the state, supporting efforts by participants in the Index of American Design, the Historical American Buildings Survey, and the Writers' Project.

Many people moved to Arizona during the thirties and the World War II years, and the population boom that they began signaled increased cultural life, which meant the arts grew as well. Walter Bimson moved to Arizona in 1932, and as President of the Valley National Bank, then the state's largest financial institution, began to form a corporate art collection of Arizona artists. Frank Lloyd Wright established his winter headquarters at Taliesin West in 1937, giving a strong presence to contemporary architecture. Civic leaders in the "Valley of the Sun," as the Phoenix area came to be known, recognizing that the state's sunshine was a tremendous asset, began promoting Arizona as an attractive winter destination and health

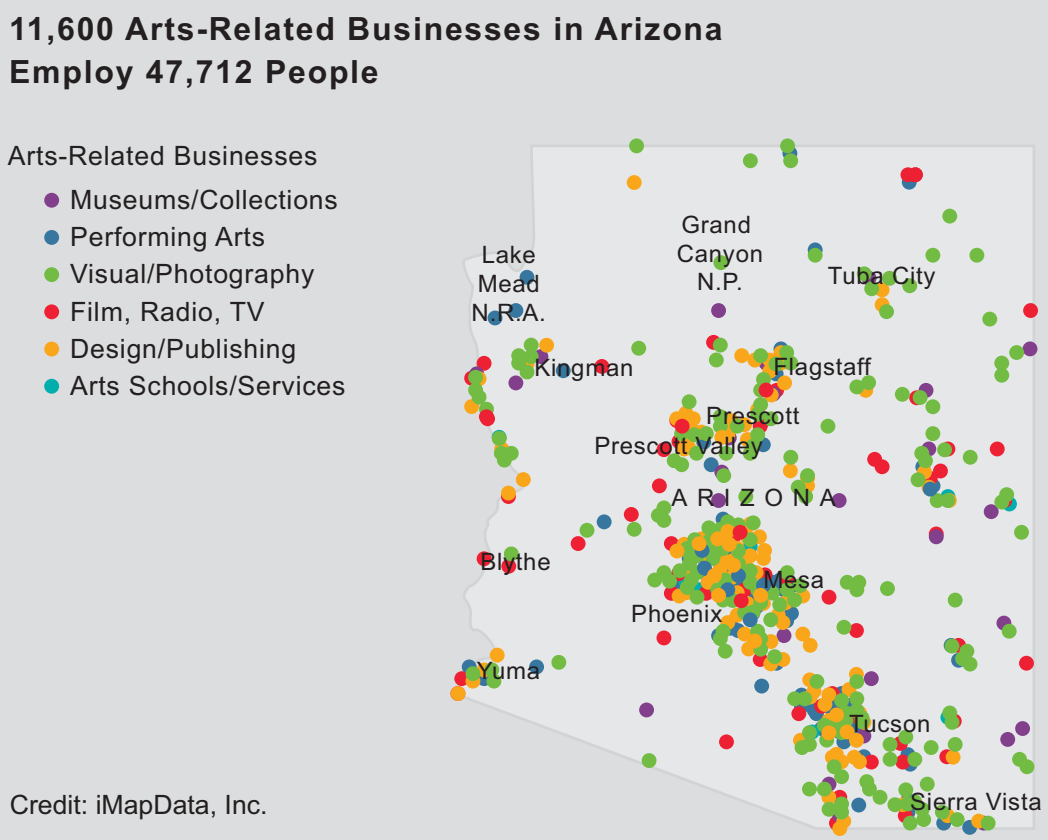
mecca during this period. *Arizona Highways*, founded in 1921 and published by the state's Highway Commission, began to emphasize its signature staples of tourism, travel, and scenery during the thirties. New institutions opened in Phoenix, including the Symphony (1947) and the Art Museum (1959). The Arizona Opera began as the Tucson Opera Company in 1971, and with the 1976-1977 season began staging complete seasons in both Tucson and Phoenix. Growth also led to the establishment of percent for art ordinances during the eighties, and public art programs were begun in the Phoenix and Tucson metropolitan areas. Situated at the intersection of art and civic dialogue, these programs have since achieved national recognition.

The Cultural Desert: Looking to the Future

Arizona's current economic challenges have infused the discussion of every sector of the state, including arts and culture. In January 2010, the Americans for the Arts issued its Creative Industries Report on the creative industries in Arizona, and revealed that there were 11,600 arts-related businesses in the state employing 47,712 people (Figure 1.1, Table 1.1).[6] Even more worked in businesses related to cultural tourism. Creative industries are focused on generating and exploiting knowledge and information (this also referred to as the knowledge economy). These ideas were the subject of considerable debate and critique when economist and sociologist Richard Florida published *The Rise of the Creative Class* in 2002. His book was widely read by those involved in the arts, economic development, and urban transformation and regeneration. Florida identified several key elements in this group, whose members were comprised of well-educated creative professionals who valued talent, tolerance, and technology (especially the Internet) within a dynamic urban environment. While his cohort was decidedly elitist, his ideas regarding the kind of social texture, in which arts and culture play a prominent role, that attracts these individuals to live in particular cities, retains much validity.

As documented by the National Assembly of State Arts Agencies, public funding for the arts in Arizona was at its highest in fiscal year 2007, at 65 cents per capita. The state then ranked 33rd in the nation. In fiscal year 2010, Arizona's legislative allocation in support of the arts fell to 15 cents per capita (the national average was $1.00 per capita), lowering our ranking to 47th in the nation (taking it back to funding levels for fiscal year 1976). Appropriations are expected to decline in 2011 by more than 28% (Table 1.2). Yet writers on what is termed the creative economy have argued that arts and culture play a significant role in both attracting and retaining a diverse pool of well-educated and innovative knowledge workers (Graph 1.1). Such individuals, who include a younger demographic, often want more than a job and a salary, and issues relating to quality of life and community building are important to them. Arizonans may want to consider this, as they work to stabilize the state's economy so as to remain nationally competitive within a global marketplace.[7] The arts can contribute significantly to this process.

Figure 1.1
The Creative Industries in Arizona, 2010.
Source: Americans for the Arts.



The Creative Industries in Arizona

This Creative Industries report offers a research-based approach to understanding the scope and economic importance of the arts in Arizona. The creative industries are composed of arts businesses that range from non-profit museums, symphonies, and theaters to for-profit film, architecture, and advertising companies. Arts businesses and the creative people they employ stimulate innovation in today's global marketplace.

Nationally, there are 668,267 businesses in the U.S. involved in the creation or distribution of the arts. They employ 2.9 million people, representing 4.05 percent of all businesses and 2.18 percent of all employees, respectively. The source for these data is Dun & Bradstreet, the most comprehensive and trusted source for business information in the U.S. As of January 2010, Arizona is home to 11,600 arts-related businesses that employ 47,712 people.

These arts-centric businesses play an important role in building and sustaining economic vibrancy. They employ a creative workforce, spend money locally, generate government revenue, and are a cornerstone of tourism and economic development. The map below provides a clear picture of the creative industries in Arizona, with each dot representing an arts-centric business.

Table 1.1

Arts-Related Business and Employment in Arizona

Data current as of January 2010

Category	Business	Employees
Museums and Collections	241	2,387
Museums	183	1,744
Zoos and Botanical	21	236
Historical Society	34	302
Planetarium	3	105
Performing Arts	1,754	9,031
Music	875	3,361
Theater	26	276
Dance	2	22
Opera	2	40
Services & Facilities	361	2,023
Performers (nec)	488	3,309
Visual Arts/Photography	3,760	11,805
Crafts	423	1,668
Visual Arts	542	1,133
Photography	2,114	5,810
Services	681	3,194
Film, Radio and TV	1,591	8,986
Motion Pictures	1,333	5,172
Television	125	3,124
Radio	133	690
Design and Publishing	3,933	13,999
Architecture	899	4,821
Design	2,261	5,063
Publishing	66	283
Advertising	707	3,832
Arts and Schools Services	321	1,504
Arts Councils	15	124
Arts Schools and Instruction	282	1,272
Agents	24	108
Grand Total	11,600	47,712

As the source of these data is based solely on business that have registered with Dun & Bradstreet, our analyses indicate an under-representation of nonprofit arts organizations and individual artists. Therefore, this Creative Industries report should be considered a conservative estimate. For more information, maps, and to make sure you are included in our Creative Industries research, visit www.AmericansForTheArts.org/sc/CreativeIndustries

Table 1.2
Per Capita Spending on State Arts Agencies, Fiscal Year 2010.
Source: National Assembly of State Arts Agencies.

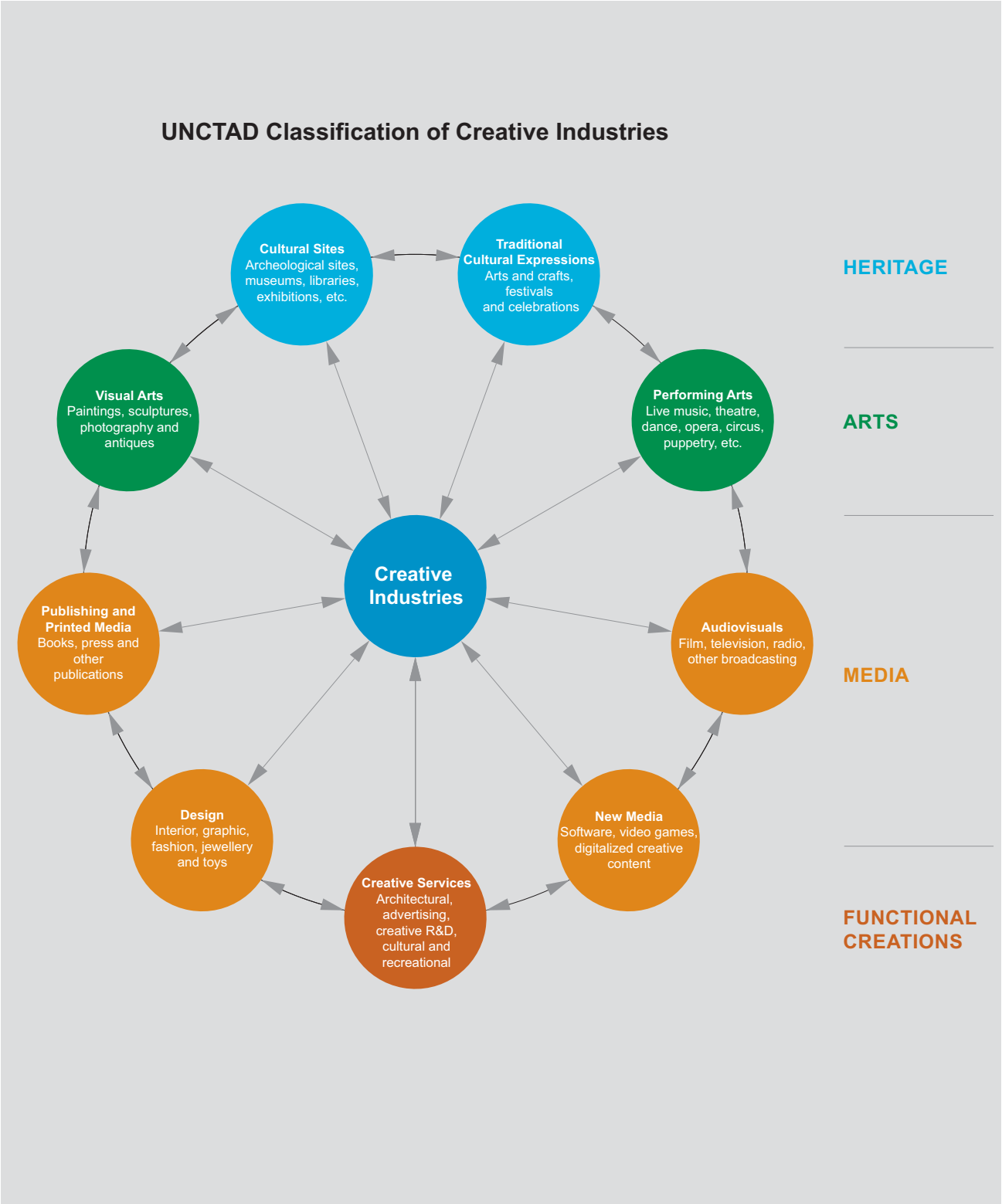
Per Capita Spending on State Arts Agencies, Fiscal Year 2011

State or Special Jurisdiction	Legislative Appropriation Including Line Items Per Capita	
	Amount	Rank
Alabama	$0.98	19
Alaska	0.99	18
Arizona	0.10	49
Arkansas	0.55	30
California	0.12	48
Colorado	0.22	45
Connecticut	1.74	9
Delaware	1.90	8
Florida	0.34	41
Georgia	0.08	50
Hawaii	3.92	2
Idaho	0.46	35
Illinois	0.66	27
Indiana	0.50	32
Iowa	0.34	42
Kansas	0.29	43
Kentucky	0.71	25
Louisiana	1.20	14
Maine	0.50	33
Maryland	2.33	5
Massachusetts	1.38	10
Michigan	0.14	47
Minnesota	5.69	1
Mississippi	0.57	29
Missouri	1.27	13
Montana	0.45	36
Nebraska	0.80	24
Nevada	0.42	39
New Hampshire	0.35	40
New Jersey	2.38	4
New Mexico	0.89	21
New York	2.12	6
North Carolina	0.92	20
North Dakota	1.06	16
Ohio	0.57	28
Oklahoma	1.20	15
Oregon	0.50	31
Pennsylvania	0.67	26
Rhode Island	2.00	7
South Carolina	0.45	37
South Dakota	0.82	22
Tennessee	1.29	12
Texas	0.25	44
Utah	1.01	17
Vermont	0.82	23
Virginia	0.48	34
Washington	0.20	46
West Virginia	1.37	11
Wisconsin	0.43	38
Wyoming	2.38	3
American Samoa	8.55	1
District of Columbia	1.64	14
Guam	2.80	6
Northern Marianas	3.62	5
Puerto Rico	6.77	2
Virgin Islands	6.77	2
Total	**$0.87**	

Per capita amounts respresent the total dollar figure for each variable divided by the total population. Total per capita dollar figures listed in the bottom row are based on the aggregate population for all 56 states and jurisdictions. States are ranked out of 50, jurisdictions are ranked out of 56.

Credit: National Assembly of State Arts Agencies

Graph 1.1



Source:
UNCTAD (United Nations Conference on Trade and Development) from the United Nations' Creative Economy Report (2008), International Trade Forum, Issue 3, 2009:
http://www.tradeforum.org/news/fullstory.php/aid/1480/Creative_Economy:_A_Dynamic_Sector_in_World_Trade.html

Some Questions to Consider Throughout *Capitalizing on Arizona's Arts and Culture*

- What is the role of the arts in Arizona in building the creative economy?
- What do the arts contribute to Arizona's economy?
- What role can the arts play in Arizona's economic recovery?
- What are the economic benefits of investing in arts and culture?
- What role should public and private funding play in the arts?
- Are the arts an appropriate function of government?

Betsy Fahlman has served as the editor of *Capitalizing on Arizona's Arts and Culture*. She is a Professor of Art History at Arizona State University, where she has taught since 1988. A specialist in American Art of the nineteenth and twentieth centuries, she also has a strong interest in the art history of Arizona, and has lectured widely throughout the state for the Arizona Humanities Council. Her academic specialties include art and industry and public art. Her publications include *Kraushaar Galleries: Celebrating 125 Years* (2010), *New Deal Art in Arizona* (2009), *Wonders of Work and Labor: The Steidle Collection of American Industrial Art* (with Eric Schruers, 2008), *Chimneys and Towers: Charles Demuth's Late Paintings of Lancaster* (2007), *James Graham & Sons: A Century and a Half in the Art Business* (2007), *Guy Pène du Bois: Painter of Modern Life* (2004), and *The Cowboy's Dream: The Mythic Life and Art of Lon Megargee* (2002). She was in Valley Leadership, Class XIX (1996-1997).

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1 The 50th Arizona Town Hall in 1987 on "Culture and Values in Arizona Life," featured a 20-page chapter on "The Arts," along with a 4-page introduction on "Culture, Values and the Arts," and a 12-page essay on "The Built Environment: Architecture and Urban Development." Of 177 pages, only 36 were devoted specifically to the arts. The other chapters were rather more general, discussing "Arizona Population Trends," "Ethics: Pluralism Or Conflict," "Religion, Charity and Philanthropy," "The Political Culture: Change and Continuity," "Communication and the Media," "Intercultural Understanding," and "Intellectual Development." In 2006, a 20-page chapter on "Culture, The Arts, and Recreation" appeared in the 89th background report, *Arizona's Rapid Growth and Development: People and the Demand for Services*.

2 Maynard Dixon, "Arizona in 1900," *Arizona Highways* 18 (February 1942): 17-18.

3 It had been designated a National Monument in 1908.

4 Yuma's Carnegie Library opened in 1921.

5 "Art Galore for Capitol," Arizona Republican, 28 May 1913.

6 These arts-related industries were defined as museum/collections; performing arts, visual/photography; film, radio, and TV; design/publishing, and arts schools/services.

7 The role of the arts fostering global competitiveness and educational achievement will be discussed in several subsequent essays. Two recent articles in the Arizona Republic address related issues. See, Russ Wiles, "Arizona Needs to Look Overseas to be Successful in Economy" (2 December 2010). The article cites Arizona's ten "global bright spots," which include two museums, the Heard and the Musical Instrument Museum. See also Nick Anderson, "On World Scale, U.S. Students Average" (8 December 2010). According to a report recently released by the Organization for Economic Cooperation and Development, students in the United States are average in reading and science, and slightly below average in math. Europe and Asia report higher scores.

Who's That Good-Looking Pie Chart Walking Down the Hall?

Alberto Rios
2010

We get lost in the wandering story,
Small, individual, unbalanced, personal
Equations that we are,

Lost in the graphs, the full-color charts,
The electronic bytes and latest trends
Busily narrating us.

Because of them, we know much,
But should also know better.
What we know is less than what we will know.

Charts begin with people
And end with people.
But in between, they are not people.

And yet, we explain ourselves in these ways—
As if our insides were a meat of numbers
Holding us up, a bone construct

Working within allowable tolerances,
Our lungs, our livers,
Our lives more statistical than actual,

We walking around
As handsome percentages of ourselves,
Beautiful portions of our futures.

We do this anyway: We let numbers
Enchant us, be our best novelists,
X-rays our best art.

But they are us.
They are us. And let's just be messy
And say it again: They are us.

American Arts Funding and the Delivery of Arts Funding in Arizona: A Primer

Jaime Dempsey
Deputy Director, Arizona Commission on the Arts

Key Points

- America's current public/private partnership funding model was established in the 1960s, and is distinct from arts funding models in other nations.
- America's largest arts funder, the National Endowment for the Arts, was founded in 1965.
- Direct government support for the arts in America accounts on average for 13% of a nonprofit arts organization's total budget; in Arizona the average is 2%-8%.
- Governments at all levels invest in their arts industries because the arts offer economic, educational, civic, and cultural benefits to communities.
- Though it was never robust, public funding for the arts in Arizona has been drastically reduced since the beginning of the recent recession.
- Arizona now ranks 49th in the nation in annual per capita arts support, providing less than 10 cents per capita in support of its arts industry.
- The Arizona ArtShare Endowment Program, developed in 1996 and considered a model public/private partnership, was dismantled as a result of budget-balancing efforts during the 2009-2011 fiscal years.
- Arizona struggles with undercapitalized private funds sources and among arts organizations there is stiff competition for private dollars.

Overview

The American structure of arts support is at its core a public/private partnership, meant to ensure broad access to arts activities and to capitalize on the vast and diverse potential of arts activities within communities. In support of an industry whose key assets include imagination, innovation, ingenuity, and inspiration, American arts funding structures work to advance the arts field and respond to evolving industry needs and economic conditions.

This chapter introduces essential arts funding information, including ways in which funding structures have been carefully constructed such that they are both reliant upon and catalysts for one another. It includes Arizona-specific arts funding data, including descriptions of support mechanisms and opportunities for further consideration and investment.

Information provided herein relates most specifically to funding support for nonprofit arts organizations, though funding support for individual artists and investments in arts education are areas worthy of profound consideration. Indeed, the contributions of artists and opportunities to learn in, through, and about the arts form the nucleus of the arts industry itself. Because artist funding is uniquely calibrated to an artist's discipline and product, and because in-school arts education is funded by government and non-government entities at multiple levels, for which the arts are not always a primary focus, this chapter focuses primarily on existing support structures for the nonprofit arts sector.

It is important to note that not all arts organizations are nonprofits and that there are successful for-profit arts organizations which do not rely on the types of funding support discussed within this chapter. Additionally the national arts sector is currently witnessing increased development of for-profit/nonprofit hybrid organizations. Though these hybrid organizations' structural rationales are as diverse as the organizations themselves, broadly stated, some arts organizations find that the limitations of the traditional nonprofit model do not allow them to best serve their identified constituencies.

Foundational Elements of the American Arts Funding Structure

Before examining American arts funding structures and their application in Arizona, it is important to understand some arts sector nomenclature and taxonomy.

A **nonprofit arts organization** is a business that pursues the development of creative product or provides arts-based services or enrichment to a community. Nonprofit arts organizations do not have owners and instead are governed by boards of directors or trustees. Like nonprofits of other types, a nonprofit arts organization does not exist to create a profit for owners or members and instead uses its funds in pursuit of its creative mission and service to its community. Most nonprofit arts organizations are eligible for exemption from some federal income taxes under section 501(c) of the United States Internal Revenue Code. Twenty-eight types of nonprofits are listed under this code; most arts organizations are type 501(c)(3).[1]

Public funding for the arts relates to funding and resources provided by governments to government-designated arts agencies, which deliver funding and support to designated constituencies. Funding itself can be made up of governments' general fund dollars, fees collected by municipal agencies, or by revenue-generating activities undertaken by government-designated arts agencies. Government-designated arts agencies typically receive legislative allocations of public monies from their authorizing government or supervisory department. Funds are most often disbursed to nonprofit arts organizations as grants. Less typically, some arts organizations receive direct line-item appropriations from federal, state, and local governments.

Government-designated arts agencies refer to agencies which support arts and cultural activities at macro- and micro-levels across America.

America's **national government-designated arts agency** is the National Endowment for the Arts (NEA). The NEA was created in 1965 as an independent agency of the United States government which offers support and funding for projects exhibiting artistic excellence. America's largest arts funder, the NEA receives its funding by way of an annual Congressional appropriation (the NEA's budget is roughly the size of Canada's annual budget for arts and culture, though America's population is roughly ten times greater than that of Canada). 60% of the NEA's grantmaking budget is delivered via direct grants to nonprofit arts organizations across the nation; 40% is delivered via a competitive grant process to state and regional arts agencies, as Partnership Agreements. State arts agencies are required to match their annual NEA Partnership Agreement grant on a one-to-one basis with a guaranteed allocation of state funds.[2]

At state levels, **state arts agencies** provide programs and services in support of statewide arts industries, and receive and disburse funds from state governments' budgets. All fifty states and the six U.S. jurisdictions (American Samoa, District of Columbia, Guam, Northern Marianas, Puerto Rico, and the U.S. Virgin Islands) have state arts agencies, most of which were created shortly after Congress established the NEA in 1965. At that time, Congress required the newly-established NEA to apportion funds to any state that established an arts agency. Within a few years, nearly every state had a state arts agency.[3] Arizona's state arts agency was established in 1966 as the Arizona Commission on the Arts.

According to Americans for the Arts, **local arts agencies** are "community organizations or agencies of local government which provide services to artists and arts organizations and/or present arts programming to the public. Each local arts agency is unique to the community it serves."[4] Many local arts agencies receive and disburse funds from city or county governments, while others have designated tax revenue streams used to fund the arts within their jurisdictions. Some local arts agencies are private nonprofit arts organizations that support themselves through a combination of fund sources.

Private funding for the arts relates to funding and resources provided by national, state and local foundations, corporations, small businesses, and individual donors.

Contributed income relates to a nonprofit arts organization's aggregate public funding and private funding revenue, including revenue generated from fundraising activities.

Earned income relates to a nonprofit arts organization's aggregate revenue generated through ticket sales, gift shops, registration, or entry fees, including fees paid to the organization for use or purchase of artistic product, facilities rentals, or for services provided.

Arts Funding in America

Our nation established its most current public/private partnership model in support of an American arts industry in 1960s with the formation of the National Endowment for the Arts and the majority of state arts agencies. These structures were launched with fiscal incentives and "match requirements," requiring that public funding be matched by other public and

private fund sources in support of access to the arts. As examples, state arts agencies are required to match their annual NEA Partnership Agreement grant monies on a one-to-one basis with a guaranteed allocation of state funds. State arts agencies themselves typically require that their grants to organizations be matched on a one-to-one basis with other public or private dollars.

The American system of funding the arts is described herein as distinct from arts support in other nations, as every nation invests in its arts industry in different ways, at varied levels. As examples, in Mexico, many large arts institutions are funded, programmed, and managed directly by state governments and public sector employees. According to the NEA, "A theatre or orchestra in Germany will likely receive 80% or more of its budget from direct governmental support. In France and Italy, government support at various levels accounts for almost all of the funding for a typical museum. Even the Louvre, which was asked to find private funding as of 1993, raises less than half of its operating budget. In America, direct government support accounts, on average, for 13% of a nonprofit arts organization's total budget."[5] (As indicated by the grantee database maintained by the Arizona Commission on the Arts, government support accounts, on average, for 2% to 8% of Arizona arts organizations' budgets.)

For many years American nonprofit arts organizations were encouraged to aim for a "60/40" income ratio, meaning an organization's revenue would be made up of 60% earned income and 40% contributed income. Arts organizations meeting that 60% earned income threshold were further encouraged by funders to seek an even greater percentage of earned income, to increase their capacity to support their work with ticket sales and registration fees.

The ideal "60/40" income ratio theory for nonprofit arts organizations has come under increased scrutiny over the last decade. Michael Kaiser, President of the John F. Kennedy Center for the Performing Arts and one of the arts sector's thought leaders, said in a September 2010 *Huffington Post* column:

> Organizations that serve very poor communities have very low levels of earned income. Their missions demand that they produce art for very low ticket prices if they are going to make their art accessible to people with little or no discretionary income. They must rely on contributed income for a large share of their total revenue. This is not bad; it is an essential part of the strategy for these groups.
>
> The level of earned income as a percent of revenue differs from organization to organization. There is not a better ratio, nor a worse one. There are simply implications of having strong or weak levels of earned income.
>
> Arts organizations with strong earned income must protect it by developing important art and by ensuring their programmatic marketing efforts are significant. If the environment is changing and it seems unlikely that these steps will be enough to protect the level of earned income, these organizations must develop stronger fundraising capabilities. Organizations with low levels of earned income must develop the strong institutional marketing programs required to ensure growth of contributed

> income. If it will be difficult to continue to build the level of contributed revenue, they must also explore ways to bolster earned income through additional ticket sales or touring activity or by finding new auxiliary sources of earned income.[6]

In a December 2010 interview, Executive Director of the Arizona Commission on the Arts, Robert Booker, reported:

> With the data we have access to as an arts funder, income ratios seem to align more with artistic discipline. At present we see that visual arts, museums and literary arts organizations typically have something closer to a 40% earned, 60% contributed income ratio, while performing arts organizations have more of a 60% earned, 40% contributed income ratio. This is likely because, in a very general sense, performing arts organizations have more opportunities to raise revenue through ticket sales, while visual arts, museums, and literary arts organizations generally rely on admission fees which are purposely kept low to increase public access.

An Investment of Public Funds in Support of the Arts

Rationale for government investment in arts industries is comprehensively outlined in a 2010 policy brief by the National Assembly of State Arts Agencies,[7] as follows:

> Governments at all levels invest in the arts because, in addition to what is considered by many to be an inherent value to society, the arts offer a distinctive blend of benefits to communities, including:
>
> - **Economic Drivers**: The arts create jobs and produce tax revenue. A strong arts sector is an economic asset that stimulates business activity, attracts tourism revenue, retains a high quality work force, and stabilizes property values. The arts have been shown to be a successful and sustainable strategy for revitalizing rural areas, inner cities, and populations struggling with poverty.
> - **Educational Assets**: The arts foster young imaginations and facilitate children's success in school. They provide the critical thinking, communications, and innovation skills essential to a productive 21st-century workforce.
> - **Civic Catalysts**: The arts create a welcoming sense of place and a desirable quality of life. The arts also support a strong democracy, engaging citizens in civic discourse, dramatizing important issues, and encouraging collective problem solving.
> - **Cultural Legacies**: The arts preserve unique culture and heritage, passing precious cultural character and traditions along to future generations.
>
> In the marketplace or among individual philanthropists, many motivations (including personal goals and advertising exposure) drive funding decisions. In contrast, government investment serves the *public* interest and ensures that all areas within a government's jurisdiction receive the benefits of the arts. Government support also:

- **provides fair access to arts resources**, especially among underserved populations
- **accurately assesses a constituency's cultural needs and assets**, then organizes efforts to help that constituency achieve goals that are relevant to its policy priorities
- **provides accountability**, ensuring that funds are distributed according to the public interest
- **reduces barriers to public participation in the arts**, such as those linked to poverty, geographic isolation, limited education, disability, age, or ethnicity.

Public funding for the arts is generally organized into three areas: federal arts support, most specifically from the National Endowment for the Arts; state arts support, most often delivered by a state arts agency; and local arts support, delivered by a local arts agency or by direct funding from a city or county government.

Supporting the Arts with Private Funding

Private funding for the arts is generally organized into three areas as well: foundation support, corporate support, and individual donations.

Private funders support the arts for a variety of reasons. Private and family foundations often fund the arts because they have identified arts support as a need in the communities they serve, because they believe investing in the arts impacts local economies and increases educational opportunities, or because the persons for whom a foundation was established identified the arts as a chief interest. Corporate funders may invest in the arts because they too have an interest in developing arts industries and activities which support improved quality of life. Corporate and business donors also fund arts initiatives as promotional or advertising tools in what is viewed as an enriching, positive industry, thereby expanding audiences for products and services.

Individual donors' reasons for supporting the arts are similarly diverse: they might have an interest in a specific creative product, they could be "giving back" to a community they care about, or their motivation might be emotional and personal, resulting from positive, inspirational artistic experiences. Other motivating factors for individual private philanthropy relate to tax exemptions. Since 1917, any donation to a tax-exempt nonprofit organization has qualified as a potential deduction for the taxpaying donor, requiring only that the taxpayer itemize his or her deductions rather than taking the standard deduction allowed by law. Today about 60% of American taxpayers itemize their tax deductions. For these individuals, the donation of a dollar to a nonprofit institution reduces taxes between 28 and 40 cents per dollar, depending on the individual's tax position. This tax incentive applies to most arts giving.[8]

According to the NEA, "Individual private philanthropy to the arts is rare in most European nations. As individual donors, Americans give almost 10 times more to nonprofits on a per capita basis than do their French counterparts."[9]

Earned Income in the Arts

As stated previously, nonprofit arts organizations also support their work with an array of earned income strategies, including individual and subscription ticket sales, registration and entry fees, facilities rentals, gift shop sales and concessions, and specialized community and educational services. Primarily, arts organizations' earned income revenue comes from fees paid to experience or participate in arts activities, as in tickets and entry fees. It is important to note that in order to comply with federal regulations governing tax-exempt status, a nonprofit arts organization's earned income projects must relate to its core organizational mission.

Like all industries for which monies are exchanged, nonprofit arts organizations must always seek a balance between current market rates, perceived value provided, quality customer service, covering organizational expenditures, and keeping consumer costs as low as possible.

The Delivery of Public and Private Arts Funding in Arizona

Table 2.1:
Federal Funding Delivered to Arizona by the National Endowment for the Arts

	NEA Funds Delivered to Arizona, Fiscal Years 2006 through 2010				
	2006	**2007**	**2008**	**2009**	**2010**
Partnership Agreement Grants	$ 717,900	$ 708,400	$ 806,900	$ 863,400	$ 938,600
Direct Grants to Organizations	$ 535,000	$ 620,000	$ 404,500	$ 504,000	$ 461,000
Total NEA Funding in AZ	**$1,252,900**	**$1,328,400**	**$1,211,400**	**$1,367,400**	**$1,399,600**

Sources: National Assembly of State Arts Agencies, National Endowment for the Arts

In fiscal year 1967, the Arizona Commission on the Arts received its first Partnership Agreement grant in the amount of $12,053 from the NEA, to support a statewide arts industry with grants, programs, and services. On what is now a three-year rotation, state arts agencies apply to the NEA for funds as a part of a competitive grant application process (Table 22.1). Partnership Agreement grant amounts have increased fairly steadily since the birth of the NEA, with funds appropriated in the following areas: *State Arts Plan, Arts in Underserved Communities, Arts Education, and Poetry Out Loud Program*. As stated previously, Partnership Agreements must be matched on a one-to-one basis with a guaranteed allocation of state funds.

Arts organizations may also be eligible to apply directly to the NEA for project support. Additionally, state arts agencies, nonprofit arts organizations, and other municipal agencies can at times access limited support for specific arts initiatives, as administered by other areas of federal government.

Regional Funding Delivered to Arizona

Besides service provided by a state arts agency, Arizona's arts industry is supported by a regional arts agency, the Western States Arts Federation (WESTAF). WESTAF is a nonprofit

arts service organization located in Denver, Colorado, dedicated to the creative advancement and preservation of the arts, its mission to "strengthen the financial, organizational, and policy infrastructure of the arts in the western states."[10] WESTAF provides support for a diverse array of programs and services to advance western states' arts industries, including several grantmaking programs. On average, WESTAF delivers between $30,000 and $50,000 annually in direct grants to Arizona arts organizations.

Arts Support at the State Level

In order to maintain their federal match, each American state is required to allocate funds to its state arts agency. To increase support to arts industries, several American cities and states have developed tax-based initiatives related to sales or property taxes, while others benefit from certain municipal licensing fees. Arizona's state arts funding has for the last fourteen years been made up of three components: a Legislative Appropriation, receipts from the Arts Trust Fund, and interest receipts from the State of Arizona-held ArtShare Endowment.

Table 2.2: State Arts Budget Summary, Fiscal Years 2006 through 2011

	Arizona Commission on the Arts: State Arts Budget Summary, Fiscal Years 2006 through 2011					
	2006	**2007**	**2008**	**2009**	**2010**	**2011**
Legislative Appropriation						
Amount Appropriated	$ 1,847,100.00	$ 1,888,100.00	$ 2,127,600.00	$ 1,930,800.00	$ 968,500.00	$ 665,600.00
Legislative Reductions	$ —	$ —	$ (96,900.00)	$ (423,200.00)	$ (146,000.00)	TBD
Appropriation Adjusted	$ 1,847,100.00	$ 1,888,100.00	$ 2,030,700.00	$ 1,507,600.00	$ 822,500.00	TBD
Arts Trust Fund						
Amount Received (estimate for 2011)	$ 1,496,130.00	$ 1,560,300.00	$ 1,706,625.00	$ 1,480,020.00	$ 1,546,460.00	$ 1,182,000.00
Legislative Reductions	$ —	$ —	$ —	$ —	$ (115,400.00)	$ (115,400.00)
Arts Trust Fund Adjusted	$ 1,496,130.00	$ 1,560,300.00	$ 1,706,625.00	$ 1,480,020.00	$ 1,431,060.00	$ 1,066,600.00
ArtShare Endowment Interest	$ 462,283.57	$ 827,609.82	$ 1,000,134.71	$ 400,312.55	$ 141,133.86	$ 9,000.00
NEA Partnership Ageement	$ 717,900.00	$ 708,400.00	$ 806,900.00	$ 863,400.00	$ 938,600.00	$ 938,600.00
Other Grants, Private Funds (estimate for 2011)	$ 123,300.00	$ 130,000.00	$ 95,900.00	$ 129,300.00	$ 116,600.00	$ 116,300.00
Overall Annual Budget (estimate for 2011)	**$ 4,646,713.57**	**$ 5,114,409.82**	**$ 5,640,259.71**	**$ 4,380,632.55**	**$ 3,449,893.86**	**$ 2,796,100.00**
ArtShare Endowment Corpus						
Corpus	$11,000,000.00	$12,000,000.00	$20,000,000.00	$20,000,000.00	$14,652,300.00	$ 9,884,600.00
Legislative Reductions	$ —	$ —	$ —	$ (5,347,700.00)	$(4,767,700.00)	$(9,884,600.00)
Corpus Adjusted	$11,000,000.00	$12,000,000.00	$20,000,000.00	$ 14,652,300.00	$ 9,884,600.00	$ 0.00

Source: Arizona Commission on the Arts

Within the Governor's proposed state budget for fiscal years 2012 and 2013, the Arts Commission's legislative appropriation has been zeroed out, listed at $0.

Overall Budget and Legislative Appropriation: The Arizona Commission on the Arts was established in 1966 with a grant from the National Endowment for the Arts. The State of Arizona began contributing funding to its state arts agency in fiscal year 1970, with a legislative appropriation of $23,561. At its highest level of funding, in 2008, the Arts Commission received a legislative appropriation of $2.1 million. With this appropriation, in 2008, Arizona ranked 33rd in the nation in annual per capita arts support.

During the prolonged recession at the end of the 21st century's first decade, and as Arizona's fiscal crisis worsened, state funding for the Arizona Commission on the Arts was legislatively reduced by 60% over three years, in addition to the raid and elimination of the groundbreaking publicly-held $20 million ArtShare Endowment (Table 22.2).

For the current fiscal year, fiscal year 2011, the Arts Commission's annual legislative appropriation stands at $665,600, its lowest level in twenty-six years. The Arts Commission's fiscal year 2011 budget of $2.8 million stands at its lowest level in twenty-one years. Arizona now ranks 49th in the nation in annual per capita arts support, providing **only 10 cents per capita** in support of its arts industry. The national annual average for arts support is 87 cents per capita.[11]

In January 2011, Arizona Governor Jan Brewer released her budget proposal for fiscal years 2012 and 2013. This budget proposal recommends eliminating the Arts Commission's annual legislative appropriation, listing it at $0 for both fiscal years.

Arts Trust Fund: The Arizona Arts Trust Fund was established in 1989 as a supplemental statewide funding source for the arts. In recognition of a vibrant arts industry's pivotal role in attracting lucrative corporate contracts to Arizona, as well as its role as an economic driver in local communities (rural communities in particular), Governor Rose Mofford and the Arizona State Legislature sought to broaden state arts support, or as per statute, to "advance and foster the arts in Arizona."

Arizona businesses are required to file annually with the Arizona Corporation Commission at a rate of $45 per year. With the establishment of the Arts Trust Fund, the Arizona State Legislature directed $15 from every annual Corporation Commission filing fee to the Arizona Commission on the Arts. Receipts are delivered monthly to the Arts Commission and disbursed statewide through existing operating support and arts learning grant programs.

Requirements as part of the enabling legislation related to investment in communities or areas the legislature identified as underserved. Per statute, "participating organizations (are required) to outline a plan to include representatives of racial and ethnic minorities on their boards," and the Arts Commission is required to direct "a portion of the funds to organizations representing handicapped persons, a portion of the funds to artists who are members of racial or ethnic minorities, and a portion of the funds to organizations representing rural areas." As demonstrated in Table 22.2, this dedicated fund continues to be targeted for reductions as a part of ongoing efforts to balance Arizona's state budget.

Governor Brewer's proposed fiscal year 2012 and 2013 budget includes an additional 8% reduction to the Arts Trust Fund.

ArtShare Endowment Program: The Arizona ArtShare Endowment program was developed in 1996 by Arizona Governor Fife Symington and the Arizona State Legislature in an effort to sustain the future of the arts in Arizona through perpetual endowments funded by public and private contributions. The program was constructed as a model public/private partnership.

The State of Arizona committed to fund a $20 million endowment.

- This endowment was to be held by the State Treasurer and invested on behalf of the Arizona Commission on the Arts, the state arts agency.
- The Arts Commission would use earned interest to provide grants to support stabilization and advancement of nonprofit arts organizations, training of educators in implementation and assessment of Department of Education Art Standards, and statewide arts education opportunities. The endowment corpus would remain invested and untapped in perpetuity.
- Funds from the endowment would augment, not replace, existing state appropriations and other support for the arts in Arizona.
- The endowment would be funded in installments by the Arizona State Legislature between fiscal years 1998 and 2008, with the public funding component completed in 2008, concluding the State of Arizona's funding obligation to the program.

The Arizona business community and private donors engaged in fundraising efforts to support the development of private statewide arts endowments.

- Leveraging the state commitment to the partnership, Arizona arts organizations would collect funding from national and local businesses, as well as private donors, to develop their own endowment funds.
- Private endowment funds would be managed by entities such as the Arizona Community Foundation (including a private statewide arts endowment invested on behalf of the Arts Commission which now totals $1.4 million; providing $75,000 in annual interest income), Community Foundation for Southern Arizona, and other local arts organizations.

By constructing the endowment program in this manner, the State of Arizona provided an incentive for national and local businesses and individual donors to donate directly to statewide arts organizations: donors could feel confident that the organizations to which they donated met the strict accountability standards required for state arts agency grants. With this program the State of Arizona modeled best business practices by promoting the development of endowments and cash reserves, and by committing to long-term public/private enterprise.

Full funding of the endowment was considered a momentous statewide achievement and looked upon nationally as a model public/private investment in the perpetuity of Arizona's arts, culture, and arts education communities, and an exemplary commitment to creativity, infrastructure, and development in a new American state. In addition, when the ArtShare Endowment program was launched in 1996, only two Arizona arts organizations had active endowment programs, totaling $3 million. In 2008 when the state completed its funding obligation to the program, nearly twenty Arizona arts organizations had endowment funds, totaling $41 million.

In budget-balancing efforts from fiscal years 2009 to 2011, with three separate actions, the Arizona State Legislature redirected portions of the ArtShare Endowment corpus to the state's general fund, zeroing out the publicly-held endowment by extricating all public funds from the venture. The Arts Commission still maintains its small private ArtShare Endowment, held by the Arizona Community Foundation, and in 2010 renewed its effort to solicit private funds to increase the capacity of this endowment with its *The Choice is Art* campaign.[12]

Support for the Arts in Arizona from Local Governments

The primary mechanism for the delivery of funding from city and county governments is through designated local arts agencies, though a small number of cities and counties provide direct grants to Arizona arts organizations. Arizona is home to thirty-six designated local arts agencies, half of which are nonprofit arts organizations and half of which are city-operated (generally speaking, those with larger annual budgets are city-operated). Some of these local arts agencies provide grants to arts organizations within their jurisdictions, and others offer programming and services in areas such as arts education, public art, performing arts presenting, festivals, and professional development programs for artists and education professionals. Annual budgets for Arizona local arts agencies range from $2,000 to $10 million.

Many of Arizona's cities and towns have experienced sizeable budget shortfalls since the beginning of the recent recession. For city-operated, municipally-funded local arts agencies, this has meant significant reductions to their budgets, which has in turn meant significant reductions to the grants they deliver to arts organizations. Two of Arizona's largest local arts agencies have outlined their reductions thusly: the Phoenix Office of Cultural Affairs estimates it is receiving 72% less funding from the City of Phoenix since the beginning of the recession; the Tucson Pima Arts Council has experienced a 70% reduction in funding over three years.

Private Funding for the Arts in Arizona

Arizona does not at this time have evidentiary data outlining aggregate private sector contributions to the Arizona arts industry. This lack of credible data is being addressed by the 2011 launch of the Pew Charitable Trust's Cultural Data Project in Arizona.[13] The Cultural Data Project is an online system which collects grantees' financial data and offers powerful reporting tools, allowing organizations and funders to monitor and analyze industry-wide fiscal trends.

Still, even without substantiating private funding information, there is little doubt that Arizona struggles with undercapitalized private funds sources and that among arts organizations there is stiff competition for private dollars. This is likely the result of several factors:

- Arizona is a young state without longstanding philanthropic relationships and traditions.
- Arizona is home to very few foundation funders as compared to other American states.

- Arizona lacks a critical mass of midsized and large corporate headquarters which might be inclined to support arts industry programs and initiatives.
- Arizona's business sector is under-diversified and largely dependent on new construction, which, given the challenges facing the real estate market, means that developers and construction companies likely do not have funds to invest in arts-based ventures.
- Arizona is home to a significant population of retirees who have moved from other American cities. These retirees are often more likely to support arts institutions in the cities they've moved from than arts organizations in their newly-adopted state.

Though statewide private funding data is not currently available, studies from the early 2000s produced robust funding data for the Phoenix Metropolitan area. In the Maricopa Regional Arts and Culture Task Force's 2004 report, *Vibrant Culture, Thriving Economy*, Phoenix ranked last amongst 10 like-sized cities in per capita contributed revenue to the arts.[14]

Questions for Discussion

How can Arizona best capitalize on the creative, economic, and educational potential of its arts sector in the context of post-recession economic recovery?

What kind of funding goals should Arizona strive to achieve in support of its arts sector, and in what timeframe?

Jaime Dempsey joined the Arizona Commission on the Arts in 2006, and has since been instrumental in reimagining the public relations potential of a state arts agency, leading the renovation of the agency's communications vehicles, online presence, and social media efforts. As Deputy Director, she has managed the restructuring of programs and services amidst significant agency budget reductions, curates the annual Southwest Arts Conference (a statewide convening of arts administrators, artists, educators, and advocates), and currently leads the development of the promotional campaign for the arts in Arizona, *The Choice is Art*. Jaime also serves on planning committees and coordinates peer-learning opportunities for the National Assembly of State Arts Agencies, an organization serving the United States' 56 state and territorial arts agencies. Prior to joining the Arts Commission, Jaime developed community programs and partnerships as the inaugural Program Manager for the Virginia G. Piper Center for Creative Writing at Arizona State University. From 1998 to 2003, Jaime managed arts education programs for the nexStage theatre and coordinated programs for the multidisciplinary Sun Valley Center for the Arts in Sun Valley, Idaho. From 2007 to 2009, she taught semester-long courses in Arts Leadership and Nonprofit Arts Management for Arizona State University. Jaime studied theatre and anthropology at Arizona State University and grew up in Peoria, Arizona. She is passionate about responsible pet ownership and volunteers regularly for Phoenix's HALO Animal Rescue.

[1] Internal Revenue Service: http://www.irs.gov/charities/charitable/article/0,,id=96099,00.html.

[2] National Endowment for the Arts: http://www.nea.gov/.

[3] *About State Arts Agencies* (Washington, D.C.: National Assembly of State Arts Agencies, 2010): http://www.nasaa-arts.org/About/About-State-Arts-Agencies.php.

[4] *Local Arts Agency Statistics* (Washington, D.C.: Americans for the Arts, 2010): http://www.artsusa.org/pdf/get_involved/advocacy/research/2007/LAA.pdf.

[5] *How the United States Funds the Arts* (Washington, D.C.: National Endowment for the Arts, 2007): http://www.nea.gov/pub/how.pdf.

[6] "The Earned Income Ratio," *Huffington Post*, 2010: http://www.huffingtonpost.com/michael-kaiser/the-earned-income-ratio_b_707071.html.

[7] *Policy Brief: Why Should Government Support the Arts?* (Washington, D.C.: National Assembly of State Arts Agencies, 2010): http://www.nasaa-arts.org/Advocacy/Advocacy-Tools/Why-Government-Support/WhyGovSupport.pdf.

[8] *How the United States Funds the Arts*.

[9] Ibid. The history of European art patronage is radically different from that of America, as are current funding mechanisms.

[10] Western States Arts Federation: http://www.westaf.org/.

[11] *Legislative Appropriations Annual Survey* (Washington, D.C.: National Assembly of State Arts Agencies, 2010): http://www.nasaa-arts.org/Research/Funding/State-Budget-Center/FY10FinalReport.pdf.

[12] Arizona Commission on the Arts: http://www.thechoiceisart.org.

[13] Members of the Arizona CDP Task Force include: Arizona Commission on the Arts, Arizona Community Foundation, City of Mesa Arts and Culture Department, Community Foundation for Southern Arizona, Flagstaff Cultural Partners, Flinn Foundation, Morrison Institute for Public Policy at Arizona State University, Phoenix Office of Cultural Affairs, Virginia G. Piper Charitable Trust, Tucson Pima Arts Council, and UBS Financial Services.

[14] See *Vibrant Culture—Thriving Economy: Arts, Culture and Prosperity in Arizona's Valley of the Sun* (Maricopa Regional Arts and Culture Task Force, 2004): http://www.pipertrust.org/publications/programspecificpubs.aspx

2 D. Bryon Darby, *Seventy Flights in Ninety Minutes, Looking West From Hayden Butte*, ©2009. A composite image visualizing all flights arriving to Phoenix Sky Harbor International Airport during a 90-minute time frame.

Arts and Culture: Arizona's Significant Stealth Economy

James K. Ballinger
Director, Phoenix Art Museum

Key Points

- The arts and culture industries represent a significant economic engine
- Arizona's arts and culture non-profits have not been included in economic impact studies
- Arts and culture professionals can play an important role in economic development discussions
- Education, arts, and culture are among the factors businesses consider when deciding where to locate
- Investment in the arts and culture creates a better business environment and overall quality of life

Arizona's economy, like other states is driven by the industrial employee base and the gross revenues derived by various industries. Thus, you have the Arizona Commerce Authority ranking categories, economic indicator studies of all kinds, and even the *Business Journal's* book of lists. These studies year after year create both the reality and the perception of a State's economic engine. For decades Arizona was known for the "Five C's": copper, cattle, cotton, citrus, and climate. In more recent years it is tourism, banking, mining, high technology, etc.

Absent from the larger view is the non-profit group as a whole, and as the subject for this overview, the more narrow category of the arts and culture economy. The purpose of this brief chapter is to create a framework that brings cultural Arizona out of the economic shadows and offers recommendations as to how this "industry" can become active part of local and statewide economic and public policy dialogues, helping to move the state out of these difficult times toward economic recovery.

A June 18, 2000, *Boston Globe* article by Gail Kelly effectively sums up the situation. "Close Look, Healthy Arts Community Helps Draw Business," discusses a report written by Beth Siegel and funded by the Massachusetts Port Authority, Philip Morris and Raytheon (also located in Tucson) for the New England Foundation for the Arts which states: "it became evident to us how much the environment and arts and culture were determining where companies want to locate. But arts people were never at the table when economic development was being discussed." The New England Foundation took this study and enlarged the findings with their own, titled *The Creative Economy Initiative: The Role of the Arts and Culture in New England's Economic Competitiveness*. This study moved the discussion away from what the author called the normal "yawn" and successfully activated it

by including a much broader look at who and what comprises the arts and culture economy. Over ten years ago a national meeting of Fortune 200 relocation officers convened at the Arizona Biltmore Hotel in Phoenix. During the meeting the president of the association was interviewed by a local radio station and commented that education was far and away the number one consideration for relocating a company or for retaining a company because it meant an available quality work force locally and it satisfied company employees' needs. When asked, "how about arts and culture?" he responded that a vibrant cultural scene would never dictate a move, but it would be a very significant reason for not putting a city on the list of potential communities. Obviously this is a lesson worth bearing in mind when considering "Capitalizing on Arizona's Arts and Culture."

Recently an example of the blending of cultural activity and the economy is the offer made by several major Canadian investors to bring an exhibition of major works of art from the Vatican Museum collections in Rome to the Phoenix Art Museum. The investors decided to visit Phoenix. It is normal to inspect the facilities for space, environmental conditions, staffing, and security systems; surprisingly, this was not the purpose. They emphasized the Museum was well known and respected; rather the concerns were "can the community support such an expensive exhibition?" Three issues needed to be resolved: first, the state-wide economy is not particularly strong and diverse; second, given the overall educational rankings, will there be a curious audience wanting to purchase tickets for the exhibition; and third, the local corporations do not have a reputation of supporting expensive traveling international exhibitions and cultural venues. These investors recognized that Arizona ranks 48th in government support of the arts and 42nd in combined public and private support. Arizona is also at the bottom of most national K-12 educational rankings. Numbers researched in depth between 2003 and 2008 by the now defunct Maricopa Partnership for Arts and Culture corroborated these numbers and went further and benchmarked metropolitan Phoenix against eight cities normally seen as economic competitors. The exhibition did not come to Phoenix.

To underscore the impact of arts and culture on our state, there are many other findings that can be reviewed. Several years ago, while attending the United States Conference of Mayors, 200 mayors across party lines signed a resolution emphatically stating the importance of investing in arts and culture to create a better business environment and a better overall quality of life. For decades national studies have demonstrated that the better the arts are integrated into the schools, the better students perform core studies, especially math and science.

More recently, a study created by the Rand Institute and the University of Chicago demonstrated how long-term investment in early childhood education is a tremendously positive investment against other social costs such as crime, health care, etc. (the report did not mention the arts). Mike Hicks, Director of the Center for Business and Economic Research at Ball State University, writing in the *Indianapolis Business Journal* (October 25-31, 2010) made the following statements after admitting he was dubious of the theory: "The return on investment of early childhood education was clearly positive. We double and triple-checked the numbers, ran the simulation again, and still the benefits were positive. In terms of investment, we found early childhood education outweighed virtually everything else government could do to boost long-run economic performance and enhance educational outcomes." The experts also agree that K-12 students involved with the arts perform better, supporting

the idea that investment in these programs create long-term economic business success. The big question then, is if scientific studies by a broad range of academic institutions, consultants, and committees consistently prove investment and experience in arts and culture create greater life quality and make sense economically, then why are so few communities willing to create public/private partnerships to take significant action? The primary reason is that leaders of the arts and culture community are rarely included when community economic strategies and decisions are made, even when some cultural institutions are larger economic engines than some of those community for-profit businesses. Thus, in order for this process to change, cultural leaders must change their paradigms on how they describe their industry, and this creates several challenges. Traditionally arts and education are seen as separate entities.

However, most cultural organizations are incorporated as educational institutions and play a significant role in the educational process. Historically, arts and cultural economic impact studies tend to examine only the non-profit, institutional budgets with widely varied categories of organizations. This makes it very difficult to create benchmarking studies. Two consistent national economic benchmarking studies are normally created by Americans for the Arts and the National Endowment of the Arts. Finally, as non-profit corporations, arts and culture institutions are not seen as part of "the business community" but cultural leaders can provide creative ideas to move the discussion forward in partnership with those tackling significant economic challenges in a town, city, or state.

Assuming the citizens of Arizona are desirous of, and willing to adopt the core policy change required, what tools are needed? Establishing an agreed upon definition of what institutions, businesses, and professions make up the art economy is a place to start. Next, an in-depth research project can be undertaken to measure and benchmark the art economy. Finally, this information can be utilized to change the dialogue toward a full acceptance of the non-profit sector, especially arts and culture being a part of policy strategies. The good news is that pieces of the projects and some of the research already exist in a high quality form. but performing more in-depth and complex work willadd significantly to what we now know.

To describe what organizations, businesses, and professions comprise the art economy, let us begin with the categories funded by the National Endowment for the Arts (NEA) and the appropriate areas of the National Endowment for Humanities (NEH). Both created in 1965, these two organizations have evolved their areas of funding over four decades. The NEA funds projects in the performing arts, theater arts, literary arts, visual arts, architecture, planning, graphic design, industrial design, and fashion design. The NEH overlaps some with the NEA but also deals with historic sites, cultural preservation, and publications. What is important to understand is that both the NEA and the NEH make grants almost totally to qualifying 510(c)3 tax-exempt organizations. They do, in addition, make very limited grants to individuals from their combined $370 million annual budget.

To expand the true definition of the art and culture economy from the institutional base many additional businesses and individuals must be evaluated. For this certain areas of historic sites, historic preservation, and defined park district projects may be considered. Looking next at what our local arts and culture commissions are funding, one would need to add zoological parks, botanical gardens, science museums, the new Musical Instrument Museum

in north Phoenix, foundations open to the public such as the De Grazia Foundation in Tucson, the Amerind Foundation in Dragoon, Paolo Soleri's Cosanti and Arcosanti, Taliesin West and other landmarked architectural sites, children's museums, historical museums, historic houses, and more. Other non-profit educational entities which operate as a part of our universities and community colleges are a major part of this economy. All have museums, performing spaces, and publications created in art departments, history departments, creative writing departments and schools of architecture, design, and planning. If we look at K-12 education, there are many art teachers, theater programs, dance, and band programs.

Next, such a study would also want to include many for-profit businesses and individuals. Start with independent artists themselves, of which there are thousands all across the state on our Indian reservations and every size town. Their primary income is their art, craft, or creative talent whatever it might be. There are a number of for-profit art schools such as the Phoenix Art Institute and the Collins School of Graphic Design. Many of the state's casinos also have gallery and museum components. As you dig deeper you will find a much broader economy than has previously been recognized.

Many of our cities have annual art, craft, and performing art festivals. They also have monthly "art walks" which do not discriminate between for-profit and non-profit entities. Many programs presented at public venues such as Comerica Theater in Phoenix will qualify. Peruse a recent, although "antiquated," Greater Phoenix Yellow Pages, and you will find over one thousand listings under art materials stores, commercial art, graphic design (almost 200) video game design, dance instructors, musical instruction, music publishers, architects (450 listings), and art galleries and consultants (over 200). Arizona is also home to Fender Musical Instruments. The state has a significant movie industry, especially in Tucson. Add to this list all of the similar entities across Arizona and you will begin to see a clearer picture of the state's yet to be fully defined art and culture economy. Everything listed above is a direct arts and culture business. It must be recognized that a reasonable portion of tourist activity in the areas of hotel accommodations, restaurants, and transportation is a direct result of cultural tourism.

At the outset of this chapter, it was noted that the New England Foundation was able to successfully energize the economic dialogue by being more inclusive. This is a model that Arizona could use. Arizona, through cooperation with Americans for the Arts, has assembled information three times during the past twenty years to reflect the tremendous vitality of our arts organizations.

Two further studies and publications were a direct result of these efforts, *Arts in Tucson's Economy: An Economic and Tax Revenue Impact Study* (The University of Arizona Office of Economic Development, 2001) and *Vital to Valuable: The Economic Impact of the Valley Non-Profit Arts Organizations and Their Audiences* (coordinated by the Phoenix Office of Arts and Culture, 2007). The Tucson study reported a $100 million economic impact and the metropolitan Phoenix study arrived at a number of $361 million. Obviously, additional impact is felt in the smaller cities of Arizona resulting in over $500 million in economic impact.

During these same years benchmarking studies were masterfully undertaken by the Maricopa Partnership for Arts and Culture (MPAC—later Arizona Campaign for Arts and Culture). The purpose of their work was to declare the necessity of cultural vibrancy in a community's development, benchmark our cities against national competitors, and finally recommend the path for Arizona to succeed. In many ways this Town Hall is the continuation of this fine work.Two economic facts of many stand out in the MPAC studies: *Creative Connections: Arts, Ideas and Economic Progress in Greater Phoenix* (prepared by Collaborative Economics) and *Perceptions Matter* (published with The Greater Phoenix Economic Council). First Phoenix, then the state, is woefully behind in government support and private support of the arts, ranking last against eight competitive benchmarked cities. These cities such as San Diego, Seattle, Salt Lake City, Austin, and others were selected by the business community as those we most compete with for a range of business and investment. Secondly, they found that while 75% to 80% of business leaders surveyed feel a vibrant cultural community is a key factor to decide where to live and work, only 20% of those surveyed feel that metropolitan Phoenix has this quality to offer. Clearly, we have work to do in Arizona to change the perception of national business leaders and for cultural leaders to be actively included in Arizona economic policy and strategy decisions.

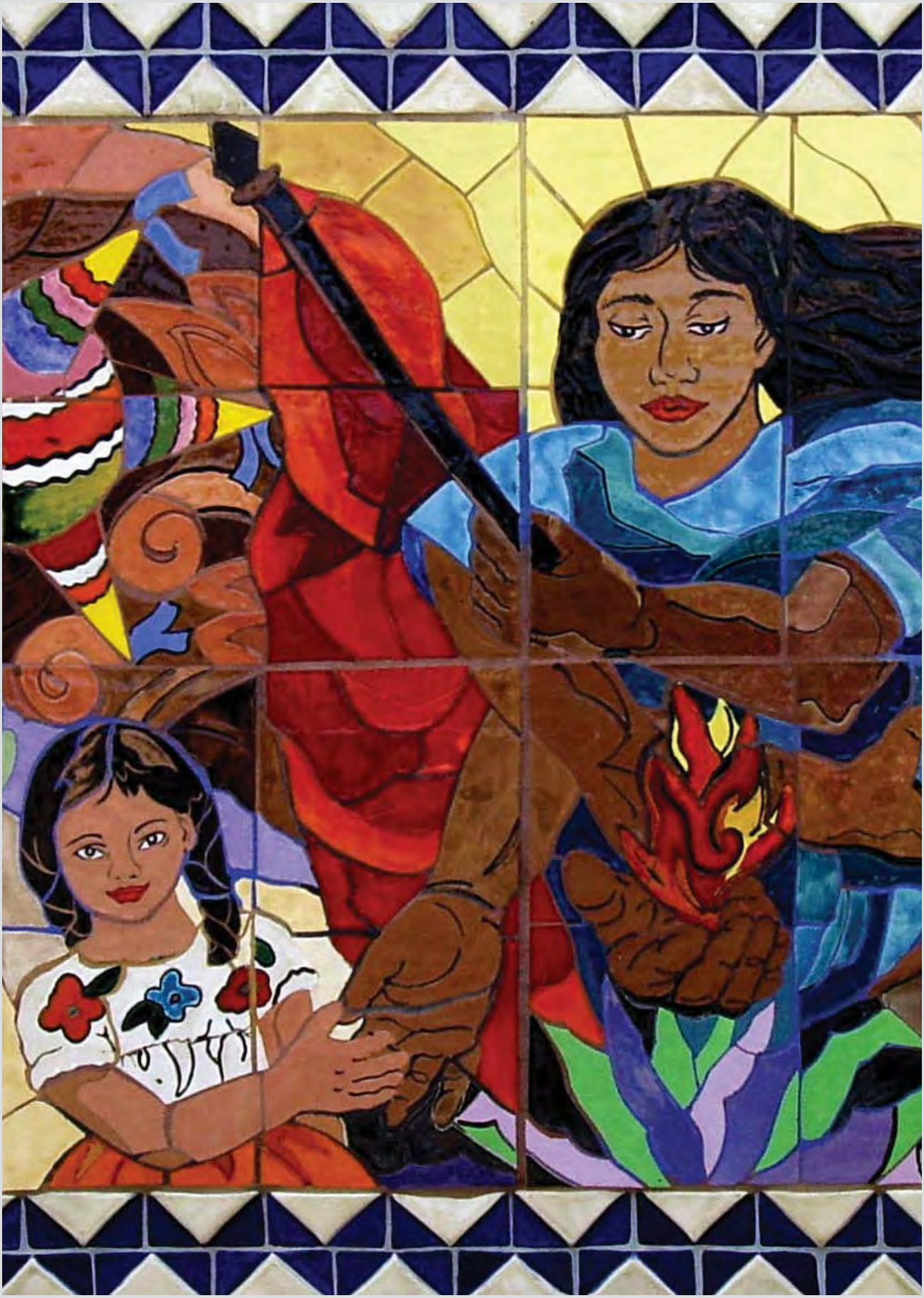
One way to do this is to create an all inclusive, statistically correct and well-stated statement of the true art and culture economy of our state. If this would be done, and then placed within our own Commerce Authority's categories of industry types it is quite possible that arts and culture would rank among our top industries. If that were the case, then other business entities might not consider the field as "charitable," but rather "investible." To create a fairly wide economic range, numbers could be assigned to various categories as mentioned in this essay, so that judgment can be passed. As a quick comparison, a broadly defined non-profit and for-profit economic study only of the performing arts in New Mexico (Av Shama and Associates, Albuquerque, Fall 1986) found over half a billion dollars in economic activity. The visual arts would most likely be larger, and then add the various cultural amenities to that total for the real impact in New Mexico.

A Hypothetical Possibility: Is Arizona perhaps even larger? Based on most indicators, the answer would be, "yes." Looking at workforce estimates, the National Endowment of the Arts 2008 study, *Artists in the Workforce: 1990-2005*, IRS statistics found that 1.4% of the Arizona workforce is listed as artists, just below the national norm of 1.5%. Given Arizona's workforce of 2.5 million, then 37,500 would be artists or arts professionals. Apply this number to average annual earnings of $27,500 and this results in industry earnings in Arizona of $1 billion. Of course, there is double counting as wages are part of reported institutional expenses, but the message remains a strong one, and makes clear the need to fully understand this component of our statewide cultural economy. For argument sake, assume our cultural economy to be easily over $1 billion, and perhaps upon a completed, accurate examination, over $1.5 billion. Where does that place its scale against other areas of the State's economy? A cursory perusal of the State's economic indicators of GDP as listed by the Bureau of Economic Analysis shows that the field would rate favorably with agriculture, information and data processing, insurance, and software and publishing. These last industries would all be considered when economic strategy and advancement are broadly discussed.

Arizona's recovery from the current recession presents a new opportunity for members of the arts and culture community to participate both at the strategic economic level and with public policy discussions in advancing the good work done by community art commissions and the Maricopa Partnership for Arts and Culture. The studies connecting education and the quality of life can thus gain momentum. Creating a high quality study and description of the unrecognized art and culture economy, not just its economic impact, could support this, allowing the art and culture community to develop leadership who can speak with a more broad voice. Recasting the discussion from charity versus investments will give arts and culture leaders parity with other business and economic leaders. Changing the paradigm reveals that art and culture is big business that enhances so many other economic sectors. It is a growth business. It is clean business. It attracts outside investment and businesses. In summation, art and culture is smart business.

James K. Ballinger has been Director of the Phoenix Art Museum since 1982. He joined the staff as Curator of Collections in 1974. He also served as Curator of American Art from 1974 to 2004, and continues to serve as Chief Curator. In November 2006 working with architects Tod Williams/Billie Tsien and Associates, Phoenix Art Museum completed its master plan developed during the early 1990's which included two capital and endowment campaigns. The first expansion completed in 1996 doubled the size of the facility. The most recent construction included a new lobby, sculpture garden and wing dedicated to modern and contemporary art. Combined the expansions cost $55,000,000, and $25,000,000 was added to the Museum's endowment. Ballinger is the immediate past President of the Association of Art Museum Directors, and sits on the boards of the Phoenix Community Alliance and The Spencer Museum of Art at his alma mater, The University of Kansas. In November 2004, he was appointed by President Bush to serve a six-year term on the National Council on the Arts. The Council advises the chair of the National Endowment for the Arts on policies, programs, and procedures for carrying out the agency's functions, duties and responsibilities. In addition, he is a member of the Dean's Council of the Herberger Institute for Design and the Arts at Arizona State University. Previously, he served as a director for the L. Roy Papp Mutual Funds and in 2003/2004 was a member of the Maricopa Regional Arts and Culture Task Force. He received a B.A. in American History and an M.A. in the History of Art from the University of Kansas, and completed the Executive Program for Nonprofit Leaders at the Stanford Graduate School of Business.

3 Cristina Cárdenas, *Mujeres/Women*, 2002, Hand-made ceramic relief mural with low temperature glazes, commissioned by Las Artes Youth Art Program, 6' x 20', North/East corner South 4th Avenue and 29th Street, Tucson.



Talking, Listening, and Connecting: Humanities as the Foundation of Our Democracy

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Key Points

- The humanities contribute significantly to civic and civil discussions about difficult issues
- The humanities bring citizens together and help identify common values
- By teaching us about the past, the humanities can help us better navigate the present and the future
- Fundamental to education and creativity, the humanities contribute to economic prosperity and personal well being

> The Arizona Humanities Council builds a just and civil society by creating opportunities to explore our shared human experiences through discussion, learning and reflection.
>
> — Mission Statement, Arizona Humanities Council

> Knowledge is no guarantee of good behavior, but ignorance is a virtual guarantee of bad behavior.[1]

> My heroes are ordinary people but their lives are not ordinary. They learned from the power of history and personal experiences to transcend artificial barriers that demarcate and diminish human beings and, in turn, lay claim to the common ground of humanity that survives despite of it.[2]

The lens of this chapter is broadly grounded in the work of the Arizona Humanities Council, but there are comparable groups in each of the fifty states, making the issues addressed here national ones, though ones that are embedded in the social and cultural fabric of Arizona. Further, the issues articulated have direct links to the economy.

Can You Hear Me Now, or Is Anyone Listening?

Despite the fact that today we are incessantly emailing, texting, tweeting, and skyping, we are not always talking with one another in truly meaningful ways. Because we are all in such a hurry to get to some place and/or to get so many things done, ours seems always a race against the clock; so much so that our communications are often little more than sound bites—incomplete ideas with minimum to no substance beyond sending, receiving, and then often working to translate cryptic codes. Surely, communications can be much more. If we are not talking with each other in substantive ways, chances are that we are also not listening to each other any more attentively. Where there is no talking or listening, there is likely to be very little if any connecting with others in ways that enhance our lives or the lives of others.

The work of the Arizona Humanities Council (AHC) has always been and continues to be about encouraging and facilitating self-reflection, asking questions, and identifying the many ties that bind us in one shared experience of living as fulfilled, imaginative, peaceful, and, yes, vulnerable humans. Especially at this most critical time in our local, national, and global human history do we strive to look beyond the divisiveness of illegal immigration, beyond our different perspectives on immigration reform and national health care, beyond our own state's ban on ethnic studies, beyond the perceived and real border-crossing threats and myths, beyond gross national products, and beyond national deficit numbers to see a greater Truth that transcends, inspires, and binds us to one another.

Humanities Bringing People Together

The mission of the humanities is central to our individual and collective efforts to achieve for ourselves and to help others to achieve a healthy life of contentment without spiritual, moral, or ethical compromise, making essential the vitality and range of humanist thinking and action. Through imagination, creativity, self-reflection, and self-examination, we can engage others in civil discourse that does not divide us. As Dr. Yasmin Saikia, Professor of History and Hardt-Nickachos Chair in Peace Studies at Arizona State University, maintains, "Peace is not conflict resolution, nor compromise and reconciliation with the brutal past as an afterthought. Peace is not non-violent means of politics. Peace requires continuous and active engagement with oneself and the world to learn and truly appreciate the indivisibility of the human community."[3] Humanists champion conflict that challenges mindless adherence to restrictive tradition and remain deeply suspicious of unmonitored authority. Humanists and humanist thinking resist ideas that control our minds and that lead us toward narcissism, ruthless competition, "suicide of the soul," economic and technological hoarding, and self-identity and self-worth achieved through and defined by material acquisition.

Understanding and standing against social injustices even as we promote cultural humility are fundamental to our efforts to being culturally literate and to understanding and appreciating the value of compassion and empathy. Our global society flourishes only when individuals take risks by admitting our human frailties and our individual vulnerabilities. That we live and die is the great human equalizer. What each of us does between this starting and ending point is the humanities work to which we as representatives of the Arizona Humanities Council are steadfastly committed.

Humanities Helping to Identify Common Values

Defining the humanities: AHC shares with over fifty other such non-profits across the United States the goal of bringing people together to talk, to listen, and to connect with one another. In this spirit, the humanities are defined broadly as the study of "language, both modern and classical; linguistics; literature; history; jurisprudence; philosophy; archaeology; comparative religion; ethics; the history, criticism and theory of the arts; those aspects of social sciences which have humanistic content and employ humanistic methods; and the study and application of the humanities to the human environment with particular attention to reflecting our diverse heritage, traditions, and history and to the relevance of the humanities to the current conditions of national life."[4]

True humanities work massages the human heart within each of us at the same time this work challenges each of us to look beyond our superficial differences to realize and celebrate our common connections. Although our values differ, our need to belong and to connect with others is fundamental to our collaborative efforts to create new knowledge. Our ability to be life-long learners has absolutely everything to do with the extent to which we know and act responsibly in our roles as engaged and enlightened global citizens who know that despite our differences, "we are more alike … than we are unalike."[5]

The challenge of engaged humanists is to demonstrate the local and more far-reaching impact of what we do, why we do what we do, and how we do what we do. Our crucial role of putting together the puzzles of our individual and collective past, present, and future is simultaneously our greatest challenge and indeed our greatest luxury in probing the complexities of how we exist. The who, why, and how of our existence is the strength of confirming that *humanities matter*, especially at this moment when attention to humanities work continues to be for too many of our neighbors invisible, unrealized, or undervalued.

Acknowledging that "Humanities create. Humanities communicate. Humanities remember,"[6] we acknowledge as the duty and pleasure of humanists everywhere to question and to seek answers to the very questions that map and define our identities. We are encouraged by the notion of possibilities in humanities work, asking the right questions that lead to a host of creative possibilities. AHC encourages Arizonans to ask questions and to arrive at answers collaboratively, answers that invariably lead to other provocative questions. Humanities then is less about a static product than about a fluid process of making meaning, of interpreting, and of finding significance in our everyday lives.

Humanities Teaching about Past to Navigate Future

Arizona is an increasingly diverse, multicultural environment. The humanities offer insightful pathways to help identify problems, to find solutions, and to address the rapidly changing circumstances of our state. Since 1973, AHC has awarded over $10 million in grants to organizations that present a wide range of public humanities programs statewide. Most of these grants were under $3,000—all under $10,000. Often, these awards leveraged other support for the projects. While this is an unsophisticated barometer of the vitality of

humanities programming in Arizona because thousands of humanities projects and conversations occur without AHC support, it nevertheless indicates the reality that dialogues employing centrally humanist perspectives of bridging and sharing cultures through talking, listening, and connecting are happening throughout Arizona, a state leading the nation in its monumental change and growth. According to the *U.S. Census* (1980, 2009), Latinos comprised about 16% of Arizona's population of 2.7 million persons in 1980. Today, Latinos are about 30.8% of the state's 6.6 million population. By 2035, minority groups will constitute 51% of Arizona's population, and by 2040, Latinos will be the majority ethnic group in the state. The humanities can provide thoughtful, creative, and respectful ways to meet our complex challenges and to celebrate our basic commonalities.

AHC encourages people to use the tools of the humanities to understand our diverse cultural heritages and to engage in thoughtful discussions about our collective futures. Beyond the grantmaking, AHC also addresses these challenges through our annual Lorraine Frank Lecture, our literature and medicine program, and our book discussions. Our Road Scholars program sends humanities experts across Arizona to speak at the request of organizations such as libraries, museums, and community centers. Host institutions select speakers from a diverse menu of scholars who discuss subjects such as Arizona during the Depression, Chicano art and culture, Arizona place names, religious pluralism, Arizona women artists, archaeology and prehistoric cultures, African American experiences in Arizona, the Arizona Women's Heritage Trail, and dozens of other subjects. Local community interest in diverse humanities themes drives and sustains our programs.

AHC grants support humanities projects that arise from the interests and needs of organizations from Window Rock to Yuma and Kingman to Bisbee. These grants fund quality programs using the insights of the humanities in multiple formats such as storytelling, symposia, exhibitions, lectures, film festivals, publications, book discussions, oral histories, electronic technologies, cultural festivals, poetry readings, public radio programs, history fairs, and other approaches.

The Museum of Northern Arizona in Flagstaff, for example, presents Navajo, Hopi, and Zuni festivals to highlight the histories, cultures, artistic expressions, food traditions, and other elements of Native American heritage. A recent Zuni festival explored Zuni language and education, emergence and migration, art industry, and the role of mapping in preserving Zuni culture. Perspectives of the Zuni scholars were invaluable in providing opportunities for learning and cultural exchange between native and non-native peoples in this public setting. AHC funded the Hopi Tribe's Homolovi Podcast Project, which used current technologies to impart traditional Hopi knowledge about the ancient pueblo community of Homolovi, north of Winslow. KNAU in Flagstaff broadcasts five programs on "Arizona Ghost Towns: Dead or Alive," linking oral histories, interviews, and music to explore the notion of place in Arizona and what we can learn from Arizona ghost towns. Grand Canyon River Guides conducted and widely disseminated oral histories of female Colorado River runners, which greatly expanded understanding of a predominately male field. Such examples suggest the wide variety of public humanities programs arising from communities and institutions on the Colorado Plateau.

A few days after the 9/11 attacks, in demented retaliation, a man shot and killed Balbar Singh Sodhi, a Sikh, who ran a business in Mesa. A few years later, the Arizona Museum of Natural History created the exhibition "Arab Americans in Arizona" to present the history of Arab American immigration and the cultural contributions to the state. AHC funded a lecture series that explored Arabic language and literature, media stereotypes, Islam in the United States, Arabs in medicine, women in Islamic and Arab cultures, and other subjects. Over 65,000 visitors experienced the project, whose goal was to provide information and change suspicious attitudes about fellow citizens from other cultures. Also with the goal of promoting cross-cultural conversation and understanding, Mesa Community College, with AHC financial assistance, has presented annual international film festivals focusing upon individual film directors and the countries in which they work—Mexico, Iran, and Japan, for instance. Reaching wide and diverse audiences, these programs offer opportunities for participants to learn about and to discuss the countries and subjects of the films as well as the goals and challenges of their directors. In Phoenix, Valle del Sol produced the film *Embracing America*, a non-partisan documentary that explores issues of immigration and immigration reform through the perspectives of residents, political activists, and scholars. A town hall setting provided a neutral and inviting forum to connect and to dialogue with one another and to experience new models for social change.

In southern Arizona, the Arizona State Museum presented "Mexico: The Revolution and Beyond" through exhibition, book signing, and discussions of early 20th century Mexican history and culture. The University of Arizona's Center for Middle Eastern Studies provided a summer institute for secondary teachers and a parallel program for high school students that focused on the historical, cultural, and religious traditions of the Middle East. The Center for Desert Archaeology in Tucson presents "Archaeological Cafés," an exploration of the latest archaeological research in the Southwest. These projects reach larger audiences through electronic distribution. AHC sponsors the Smithsonian Institution's "Museums on Main Street" program in Arizona, and when the exhibition "Between Fences" traveled to Ajo, collaboration among high school students in Ajo, the nearby Tohono O'odham Nation, and students across the U.S. border in Sonoita, Sonora created the most marvelous artworks and dialogues focusing on breaking down physical barriers such as fences and cultural divides.

Many do not know that the United States government interned Japanese Americans during World War II in western Arizona near Parker on the Colorado River.[7] The Colorado River Indian Tribes explored the internment on the Poston reservation through reality and fiction. Cynthia Kadohata, author of *Weedflower*, the story of a Japanese American female's experience in the camp, participated as a panelist and the book was discussed throughout the Parker Unified School District. Prominent in the dialogue was a focus on race relations on reservations between tribal and non-native peoples and among the various tribal affiliations: Mohave, Chemehuevi, Navajo, and Hopi. Participants agreed that, even locally, little is understood of this nationally significant event in U.S. history. These few examples from around the state merely sample the extraordinary diversity of presentations and dialogues that utilize humanities perspectives to explore issues of local and national significance. Each in its own way contributes to talking, listening, and connecting, and builds our common humanity toward a better present and future.

Arizona Doing Humanities

Humanities contribute to our prosperity, to our creativity, and to our civility. As our local, national, and global economies suffer, as educational programs are cut, as teachers lose their jobs, "state support for higher education is in decline nationwide."[8] The U.S. ranking as a leader in higher education has plummeted. In Arizona, we witness schools and libraries closing across the state as we scramble to deal with looming fiscal deficits, creating more economic disparities among us. As we ponder the needs that determine the quality of life for all of Arizona's citizens, we acknowledge that "there is growing social and economic stratification between those with access to a quality higher education and those without."[9] Such realities might spell disaster for our individual and collective futures were we not committed to working creatively and together to address both the social and economic impact of these changes.

Humanities contribute to our economic stability as "education is a public investment in the nation's interest."[10] In many fundamental ways, the U.S. cannot compete effectively in a global economy without the humanities; indeed "our edge lies in our creativity, entrepreneurship and innovation," and "the humanities are particularly good at developing those skills."[11] Arizona State University President Michael M. Crow observes that in order to be globally competitive, today's students must learn rapidly to be "capable of integrating a broad range of disciplines in a rapidly changing world."[12] Humanities play a vital role in our local and national efforts to discover, to create, to understand, and to innovate.[13] It is not surprising to humanists then that "cuts in the humanities are bad for business and bad for democracy… [as] humanities supply essential ingredients for a healthy business culture."[14] We also acknowledge that humanities, science, and technology are inextricably intertwined, not the perceived embattled enemies of progress, prosperity, and personal well being. Recall the significant impact of Senate Bill 1070 and the significant revenue loss resulting from the failure to recognize both the social and economic ramifications of the law (the impact affected cultural tourism, among other things).[15] The humanities can teach leaders to view the world across disciplines and beyond the limits of our own experience in order to better understand and appreciate the experiences and perspectives of others.

Arizonans Being Civil

The humanities contribute to social stability and are central to democracy in Arizona; arguably, "you need the study of languages, culture, clarity of expression, philosophy, religions and history in order to create a literate citizen."[16] Arizona has been in the national and international news recently and not always in the best social and political light. Controversial immigration legislation, the ban on ethnic studies, the repeal of equal protection laws preventing discrimination in education, employment and government contracting, and even the story of the Prescott skin-lightening mural have placed our state under a microscope, making Arizona the object of comics' jokes and of condemnation by United Nations human rights experts.[17] AHC knows that these negative images and narratives of intolerance do *not* paint a complete picture of who and how all Arizonans are. These images and narratives do *not* reflect the rich history, diversity, and complexity of our many individuals and communities who value and respect difference.

During the past year, AHC has worked strategically to resurrect civility in Arizonans' communications. From across the state and across various age groups, ethnicities, and backgrounds, Arizonans have come together to talk about competing perspectives on public health care, sales taxes, and immigration through Project Civil Discourse (PCD). These conversations are a deliberate effort to move away from the angry diatribes often reflected in and perpetuated by the media. The goal of PCD is twofold: to demonstrate that it is not necessary to "demonize people who disagree with you" and to bring balance and civility to the problem-solving to address the issues that affect all of us on some fundamental levels.[18] We are not alone in recognizing the urgency of this mission. Jim Leach, Chairman of the National Endowment for the Humanities, is engaged in a 50-state "civility tour" encouraging conversation and understanding of the inextricable connection between humanities, civility, and democracy. This hunger for civility in our national conversations signals a collective call for respectful and thoughtful voices to bridge the cultural and political clashes that continue to divide our state, our nation, and our world. Arizonans embrace this call to move away from divisiveness and towards a new focus on our shared concerns and solutions.[19] PCD is not the only effort in Arizona to promote civil debate. The University of Arizona has established the National Institute for Civil Discourse that will provide "a setting for political debate that is both frank and civil," and which will "advance civility through research, debate and educational programs."[20]

Humanities Guiding Arizona's Future

Although critical, education alone cannot shape the future of Arizona. The health and vitality of our future depends on Arizonans' active participation in conversations about what matters. Arizona's civic health lags behind the rest of the nation because "Arizonans are not as well informed as people in other states, voter turnout continues to decline, Arizonans are not as strongly connected to one another as people in other states, there is an educational divide in citizen participation, and Arizonans feel a growing disconnect with the leaders they elect to represent them."[21] Indeed, "only 10 percent of Arizonans feel their elected officials represent their interests," and "only 12 percent of citizens believe the people in their community care about each other."[22]

In many ways, Arizona is at the crossroads. Many of our arts and cultural institutions are at risk of disappearing or being severely cut. If Arizonans continue to support and to re-commit public and private dollars to fill the gaps, if Arizonans continue to contribute their time and talent to participating in the leadership of our state by voting, running for office, and holding our elected officials accountable, this risky state of affairs can change. At the center of reaching any and all of these goals toward becoming and being a better Arizona is our ability *to talk to, listen to,* and *connect with* one another. AHC's responsibility over these nearly forty years continues to be to create "safe spaces" for difficult conversations to take place. AHC cannot do this important work without the commitment and awareness of Arizona's engaged citizens. As advocates for the range, excellence, and impact of the humanities, our individual and collective challenge is expressed in this urgent and quite fundamental call to action:

Let's build bridges here and there
Or sometimes, just a spiral stair
That we may come somewhat abreast
And sense what cannot be exprest
And by these measures can be found
A meeting place—a common ground
Nearer the reaches of the heart
Where truth revealed, stands clear, apart
…
Oh, let's build bridges everywhere
And span the gulf of challenge there.[23]

Compassionate and thoughtful Arizonans from all sides understanding, embracing, celebrating, promoting, practicing, and preserving this important humanities work here and beyond for our collective greater good can and will make our state, our nation, and our world a better place for all.

Neal A. Lester is professor of English and dean of Humanities in the College of Liberal Arts and Sciences at Arizona State University. With specialties in African American literary and cultural studies, Dr. Lester is an award-winning teacher and the author or co-editor of four books. He has written or lectured extensively on such topics as the "n-word," black/ white interracial intimacies in popular music, Little Black Sambo as a non-trickster, the race and gender politics of African Americans and hair, African American children's literature, black masculinities in hip hop music, Disney's first African American princess, and personal ads as African American autobiography and biography. His writings have covered such authors as Toni Morrison, Alice Walker, Zora Neale Hurston, ntozake shange, Ernest Gaines, bell hooks, Carolivia Herron, and Richard Wright. Dr. Lester chairs the Board of Directors of the Arizona Humanities Council.

Thomas H. Wilson is Director of the Arizona Museum of Natural History in Mesa, Arizona. Previously he was Director of the Museum of New Mexico in Santa Fe; Director of the Logan Museum of Anthropology and the Wright Museum of Art, and Director of Museum Studies, at Beloit College; Director of the Southwest Museum in Los Angeles; and Deputy Director of the Museum for African Art in New York City. Tom Wilson earned a B.A. from the University of New Mexico and his M.A. and Ph.D. from the University of California, Berkeley, in anthropology, and a J.D. from the University of Maryland. He was Assistant Professor at the University of Nairobi, Coast Archaeologist for the National Museums of Kenya, and Program Officer in the Museums Program at the National Endowment for the Humanities. He has conducted fieldwork in the American Southwest, Great Basin, Mexico and Central America, and Eastern Africa. Most recently he has worked on museum projects in Yunnan Province, southwest China, and in St. Petersburg and northwest Russia. He currently serves as Vice Chair of the Arizona Humanities Council and on the board of the Mesa Historical Museum. Tom Wilson is listed in Who's Who in America. His passions, in addition to the humanities, are triathlons and German Shepherd Dogs.

Brenda Thomson, Executive Director, joined the Arizona Humanities Council in March 2010. Thomson brings a wealth of knowledge and experience to the Arizona Humanities Council; specializing in executive management, fundraising, human resources, public speaking, community relations, and strategic planning. Prior to joining the Arizona Humanities Council, Thomson served as the Director of The Center for Law Leadership and Management at the Sandra Day O'Connor College of Law at ASU, and Executive Director of the Maricopa County Bar Association. She earned her bachelor's degree in English from Yale University in 1983 and her J.D. from Yale Law School in 1989. Thomson also enjoys volunteering with a variety of local organizations that promote education, leadership and diversity including BookPALS, the Diversity Leadership Alliance, Valley Leadership, Florence Crittenton, Glendale Chamber Foundation, Arizona Women's Forum, Phoenix Rotary 100, and Park Central Toastmasters.

[1] Martha C. Nussbaum, *Not For Profit: Why Democracy Needs the Humanities* (Princeton, NJ: Princeton University Press, 2010): 81.

[2] Yasmine Saikia, Hardt-Nickachos Chair in Peace Studies at Arizona State University, inaugural lecture (29 September 2010) (unpublished).

[3] Ibid.

[4] National Foundation on The Arts and the Humanities Act of 1965 (P.L. 89-209).

[5] Maya Angelou, "Human Family," 3 October 2010 http://www.ctadams.com/mayaangelou12.html.

[6] Germany, Federal Minister of Education and Research Annette Schavan, *The Year of the Humanities—An Overview* (Bonn: Federal Ministry of Education and Research, 2007).

[7] A second internment was established at Gila River near Casa Grande. Both were located on Indian reservations, and collectively held nearly 35,000 prisoners.

[8] Mark G. Yudof, "Exploring a New Role for Federal Government in Higher Education," 2 December 2010 http://www.universityofcalifornia.edu/president/governmentrole_100909.pdf.

[9] Michael M. Crow, "Building an Entrepreneurial University," in *2008: Rethinking the Role of the University and Public Research for the Entrepreneurial Age*. "The Future of the Research University: Meeting of the Global Challenges of the 21st Century." Ewing Marion Kauffman Foundation. 8-11 June 2008. www.kauffman.org. 17.

[10] Susan Talbert, "Review of *Higher Education under Fire: Politics, Economics, and the Crisis of the Humanities*," Michael Bérubé and Cary Nelson, eds., January/February 1997: 106.

[11] "Trends in Offshore Outsourcing: Service Science, KPO, and Knowledge Technology," *Evalueserve* 2008.

[12] Michael M. Crow, "Enterprise," 18.

[13] Michael M. Crow, "Humanities Programs Illuminate University Innovation," *ASU News*, 7 May 2008.

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[15] "Fast Facts on Arizona's Immigration Crack Down," *Center for American Progress*, 23 April 2010: http://www.americanprogress.org/issues/2010/04/arizona_facts.html.

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[17] "Arizona Ban on Ethnic Studies Divides Educators," *National Public Radio*, 24 May 2010; "Arizona Leaders Lament as State's Image Takes Beating with New Immigration Law," *Washington Post*, 7 June 2010; "Arizona Ethnic Studies Ban Reignites Discrimination Battle," *Arizona Republic*, 19 May 2010; "Arizona Ethnic Studies Classes Banned: Teachers with Accents Can No Longer Teach English," *HuffingtonPost.com*, 5 May 2010; "Nation Marvels at Arizona Mural's Near Whitewashing," *Atlantic Wire,* 8 June 2010.

[18] "Bringing Civility Back To Discourse," *Arizona Republic*, 18 August 2010: B4.

[19] Tamara Woodbury, "Your Help Is Vital to Repairing Arizona," *Arizona Republic*, 20 September 2010: B7.

[20] Anne Ryman, "Civil-debate institute to open at UA," *Arizona Republic*, 21 February 2011.

[21] "Arizona Civic Health Index 2010," *Center for the Future of Arizona* (Phoenix: Center for the Future of Arizona, 2010): 3.

[22] "Arizona Civic Health Index," 2.

[23] Georgia Douglas Johnson, "Interracial," in *I, Too, Sing America: Three Centuries of African American Poetry*, Catherine Clinton, ed. (Boston: Houghton Mifflin Company, 1998): 51

Arizona Arts Education

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Lynn Tuttle
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Key Points

- 90% of Arizonans believe arts education is either important or very important
- Arizona has been a policy leader in being one of eleven states with an arts admissions requirement for our state universities
- Arts education improves academic achievement, creates greater leadership and social skills, enhances critical thinking, and sharpens problem solving skills
- Superintendents rank arts activities in the top four that are most likely to develop creativity
- U.S. employers rate creativity/innovation among the top five skills that will increase in importance over the next five years
- Not weighting arts courses equally with other core subjects creates a barrier for student participation
- The lack of alignment with education curriculum and the Arizona Academic Arts Standards creates a gap between arts education policy and practice

In May, 2009 Arizona State University conducted a public opinion poll on how Arizonans value arts education. Like the more broadly defined American public, 90% of Arizonans believe arts education is either important or very important. In fact, arts education was more highly valued than all-day Kindergarten, which received support from 69% of the poll respondents.

With such a high premium placed on arts education by Arizonans, how are the arts (dance, music, theatre, visual arts) faring in Arizona's public K-12 schools? What opportunities to study and experience the arts do the arts and cultural community offer to young Arizonans? And what is the role of community leaders, parents, and voters in supporting arts education in Arizona?

This chapter will outline arts education in Arizona and where it stands today, by delving into the results of the 2009 Arts Education Census, presenting some of the policy and research that informs Arizona practice, and highlighting the individuals who deliver and support high quality arts education in Arizona.

Arizona Arts Education POLICY

Public education is governed by federal, state, and local educational policies.

At the federal level, arts education is included as one of the core subject areas in the *No Child Left Behind* Act, the current version of the Elementary and Secondary Education Act, more commonly referred to by its first chapter, Title I. "This act stands as one of the most significant efforts to affect arts education, as the arts are treated as a 'core academic subject' and treated equally with reading, math, science, and other core disciplines."

At the state level, Arizona has long had policy that informs arts education and stands as a leader with the development of early policies which are supportive of arts education. Arizona's State Board of Education (appointed by the Governor; the State Board also includes the elected Superintendent for Public Instruction) defines what subject areas will be taught in Arizona schools. State Administrative Code requires that common schools (grades K-8) must offer music and visual arts, while the other performing arts are voluntarily offered, and that high school graduation requirements include a shared credit requirement—fine arts or vocational arts. The State Board also defines what will be covered in required subject areas through the adoption of academic standards. Arizona's academic standards in the Arts were originally adopted in 1997 and were revised in 2006.

Finally, the State Board creates certification requirements for Arizona's public educators. Arizona has a PreK-12 arts education teaching certificate, adopted in 2008, as well as arts endorsements. Our certification requirements for the arts date back to 1969, and Arizona was an early leader in creating certification endorsements in dance and theatre (dramatic arts).

A separate governing body, the Arizona Board of Regents, sets forth university admission requirements for Arizona's public universities. The Board of Regents includes one unit of fine arts as an admissions requirement, most recently updated in 2006. Arizona stands again a leader in terms of policy, as we are only one of eleven states with an arts admissions requirement for our state universities. However, the arts are not graded equally with other subjects, nor does the AIMS test measure anything in the arts.

In 1996, the Arizona legislature and Governor Symington added its support to arts education in the creation of the Arizona Arts Endowment Fund (institutionalized as Arizona ArtShare), the state's public endowment for the arts. Administered by the Arizona Commission on the Arts, one of the outlined goals of ArtShare was to use the interest from the $20 million public endowment to increase education/outreach programs of arts organizations, including the training and implementation of the Arizona Academic Standards in the arts. Unfortunately, recent action by the legislature in Fiscal Years 2009 and 2010, swept the public ArtShare endowment in its entirety as a part of efforts to close significant state budget shortfalls.

Arizona Arts Education RESEARCH

The Benefits of Arts Education

A tremendous body of research exists nationally documenting the many benefits an arts education provides to students including: improved academic achievement, greater leadership

and social skills, enhanced critical thinking and sharper problem solving skills. Studies further suggest that for certain populations—students from economically disadvantaged circumstances, students needing remedial instruction, and young children—learning in the arts may be especially helpful in boosting learning and achievement.

Of note:

- Student Achievement: Data from The College Board show that students who take four years of arts and music classes while in high school score 91 points better on their SATs than students who took only one-half year or less (scores of 1070 vs. 979, respectively). In Arizona, increased student achievement has been linked to the Opening Minds through the Arts program in Tucson Unified School District (which is supported by private funding).

- Lifetime Impact: U.S. employers rate creativity/innovation among the top five skills that will increase in importance over the next five years, and rank it among the top challenges facing CEOs. Among eleven subjects offered in high school, superintendents rank arts activities in the top four that are most likely to develop creativity.

- Problem Solving: "Learning in individual art forms, as well as in multi-arts experiences, engages and strengthens such fundamental cognitive capacities as spatial reasoning (the capacity for organizing and sequencing ideas); conditional reasoning (theorizing about out-comes and consequences); problem solving; and the components of creative thinking (originality, elaboration, flexibility.)"

Access to Arts Education in Arizona

With relatively strong state and federal policy supporting arts education in Arizona, and a substantial body of research to support arts learning, what does arts education look like in our state's schools?

Over the past three decades, arts education practitioners, researchers, and advocates have attempted to answer this question. In the early 1990s, the National Endowment for the Arts reorganized its focus on arts education by encouraging collaborations between state arts agencies and state departments of education. As a result, the Arizona Commission on the Arts, through strategic funding with its partners, created the Arizona Arts Education Research Institute (AAERI), a partnership of the fine arts colleges of the three universities, the Arizona Department of Education, and the Arizona Commission on the Arts.

The Morrison Institute of Arizona State University produced three separate reports outlining arts education in Arizona on behalf of AAERI, beginning in 1988. In all three cases, bellwether districts and personnel were interviewed; however, Morrison did not attempt to survey all schools in the state. The Morrison publications found a high variability in support for arts education, from personnel to minutes available to number of artistic disciplines taught. Over the thirty years of research, some districts and schools increased support while others decreased. Variability remained while strengths and weaknesses shifted in the system. Strong governing board and parental support grew programs while less supportive administrators dismantled others.

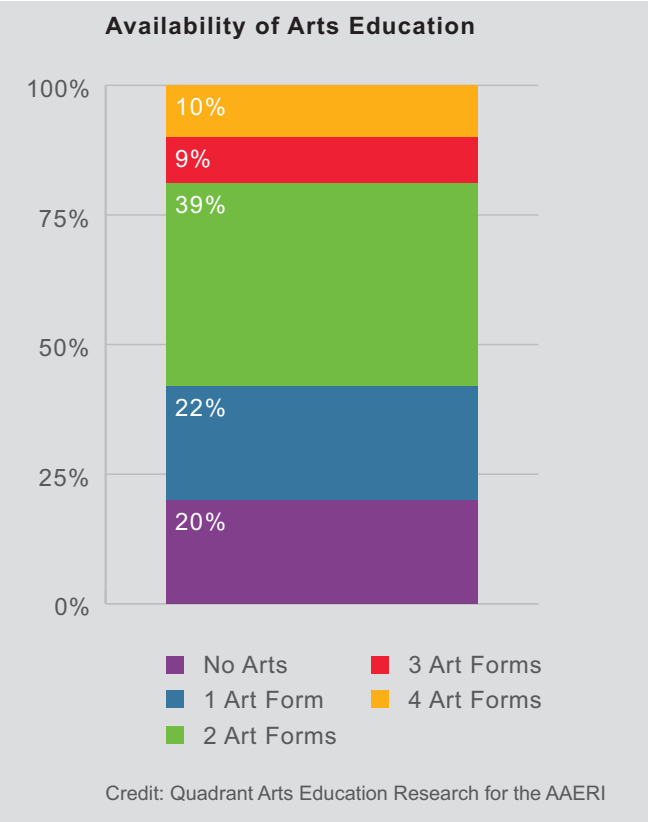
As research and data collection became more sophisticated, the arts education field began to ask for more in-depth, school-level data collection and analysis. In 2007-2009, AAERI led the call for a school-by-school census on how the arts are taught in Arizona. Begun with a seed grant from the Arizona Community Foundation, AAERI commissioned a school-by-school census of arts education in Arizona.

Working in partnership with the Arizona Department of Education's Research and Evaluation Unit, and contracting with Quadrant Arts Education Research (a national leader in arts education data collection and analysis), AAERI launched a school-by-school arts education census in March 2008. The census achieved a 22% response rate, representing schools from all fifteen Arizona counties, and a proportional response rate from charter schools, which make up 25% of all Arizona public schools.

In addition to the voluntary census, AAERI also utilized access to the state's Highly Qualified Teacher database, where all 1,889 public schools—district and charter—report on highly qualified music and visual arts educators.

Arizona Arts Education PRACTICE

Graph 5.1



The 2009 Arts Education Census provided Arizona, for the first time, baseline data on the delivery and practice of arts education in Arizona schools. The following section outlines the practice of arts education, based on the census results.

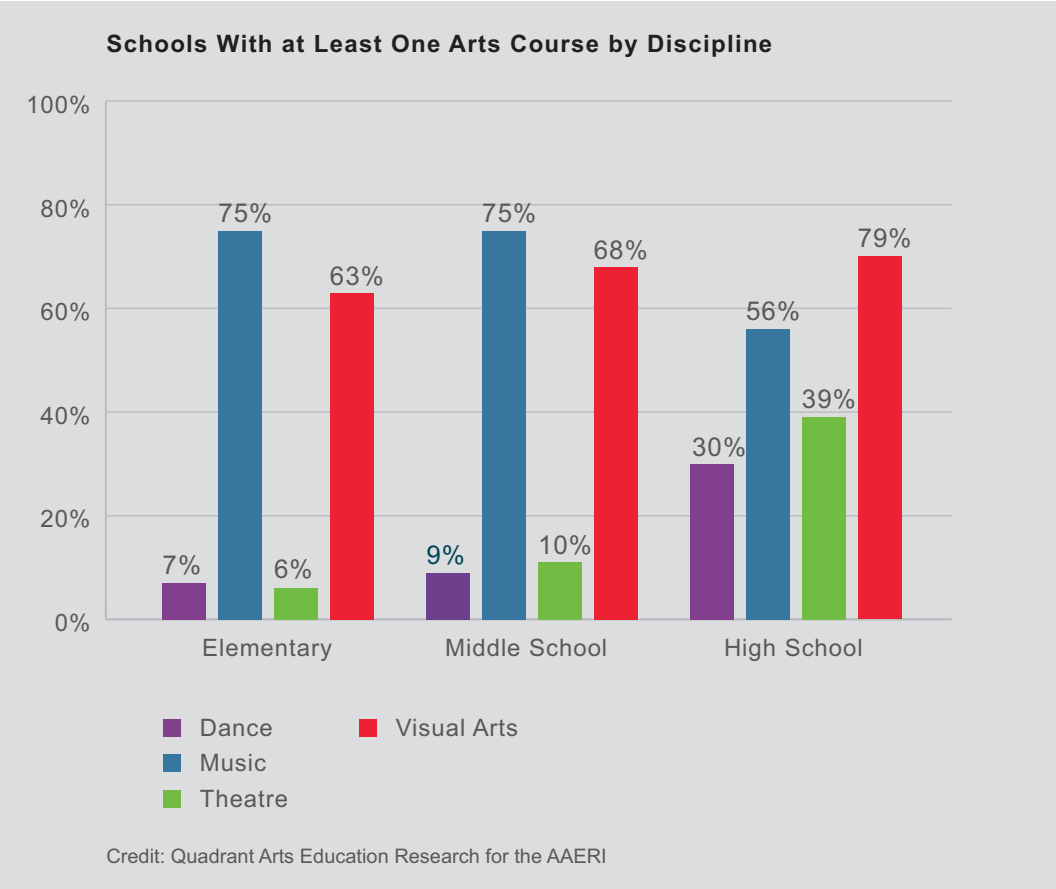
Availability of Arts Education:

20% percent of schools offered no courses in any arts discipline. Another 22% offered at least one course in one arts discipline More commonly, (39%) schools offered at least one course in two different disciplines. Relatively few schools offered at least one course in three arts disciplines (9%) or four disciplines (10%). (Graph 5.1)

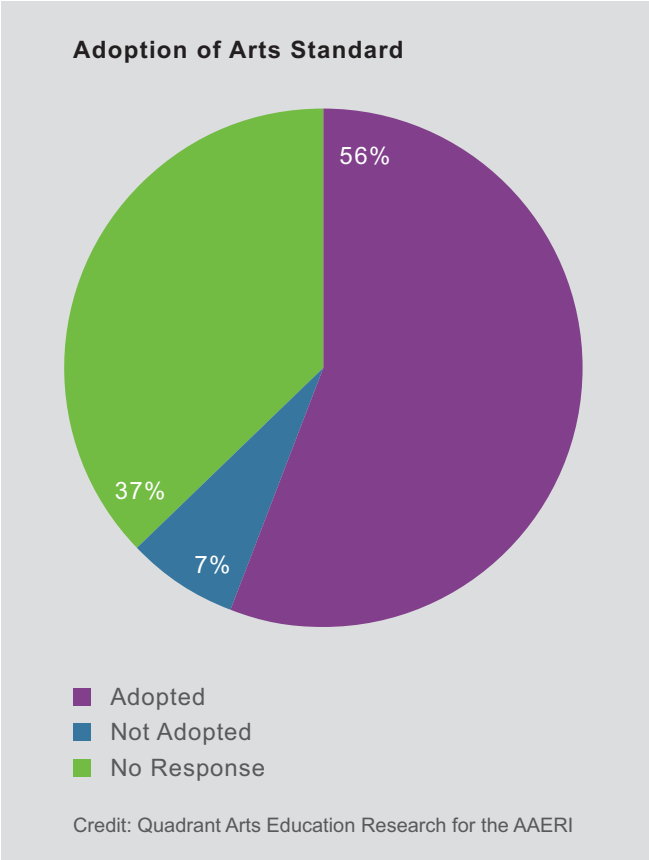
Required Instruction:

When combining all arts disciplines, 80% of Elementary, 83% of Middle, and 80% of High Schools offered at least one class/course in any of the four arts disciplines. Just over half (55%) of the schools provided instruction in BOTH music and visual arts as required by the Arizona Administrative Code (the Code is not uniformly enforced). 19% offered instruction beyond music and visual arts. The breakdown by arts discipline for the three school types is on the left (Graph 5.2).

Graph 5.2



Graph 5.3



Adoption of Arts Standards

As of 2009, only 56% of schools reported that their arts education curriculum had been updated to align with the Arizona Academic Arts Standards. Of the reporting schools, 7% had not adopted the state standards while 37% did not answer the question (Graph 5.3).

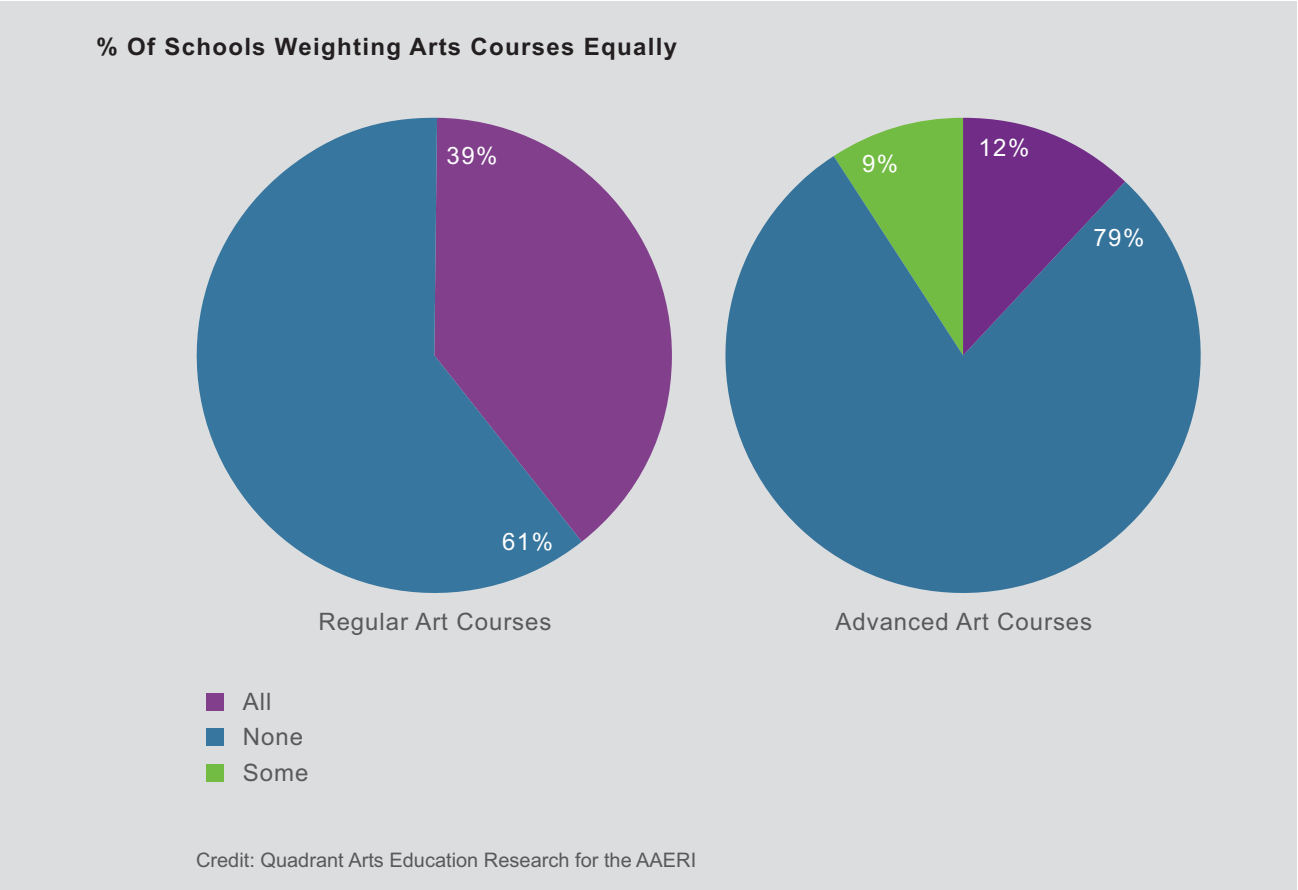
Graduation Requirements:

53% of responding High Schools reported using the shared credit with vocational arts (which include graphic design, career and technical education, construction, and computer aided design) to meet the state graduation requirement. 36% reported using a stand alone fine arts credit. All totaled, 43% of High Schools meet or exceed the arts graduation requirement set by the state with a stand alone fine arts credit. 4% of High Schools reported no graduation requirements.

Grade Weighting:

61% of Arizona High Schools do not weight arts courses equally with other core subjects and 79% do not weight advanced arts courses equally with other advanced courses, creating a barrier to participation in arts courses for Arizona's high school students (Graph 5.4).

Graph 5.4



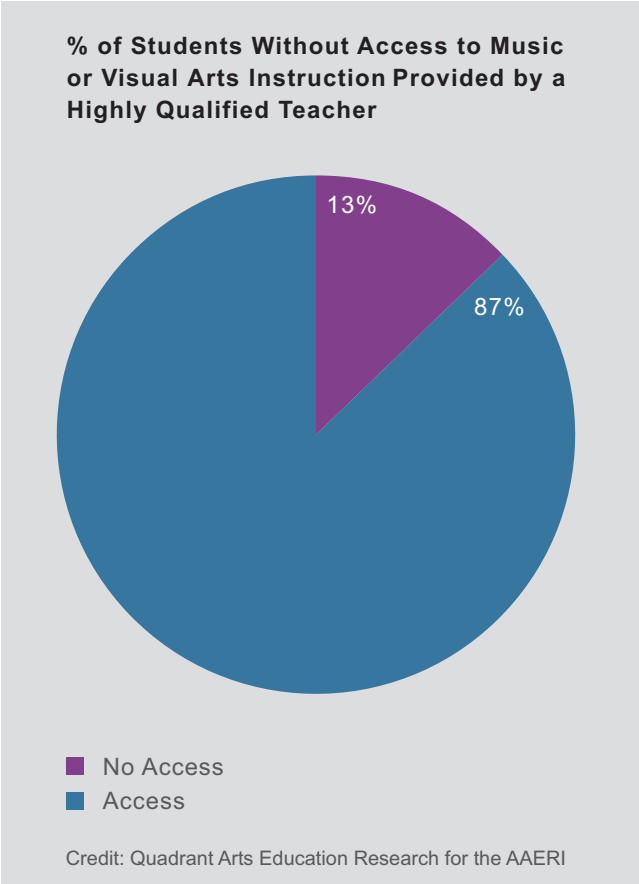
No Access:

134,203 students (or 13% of the total student population) attend school each day without access to Music or Visual Art instruction provided by a highly qualified arts teacher (Graph 5.6 and 5.7).

Schools without HQT:

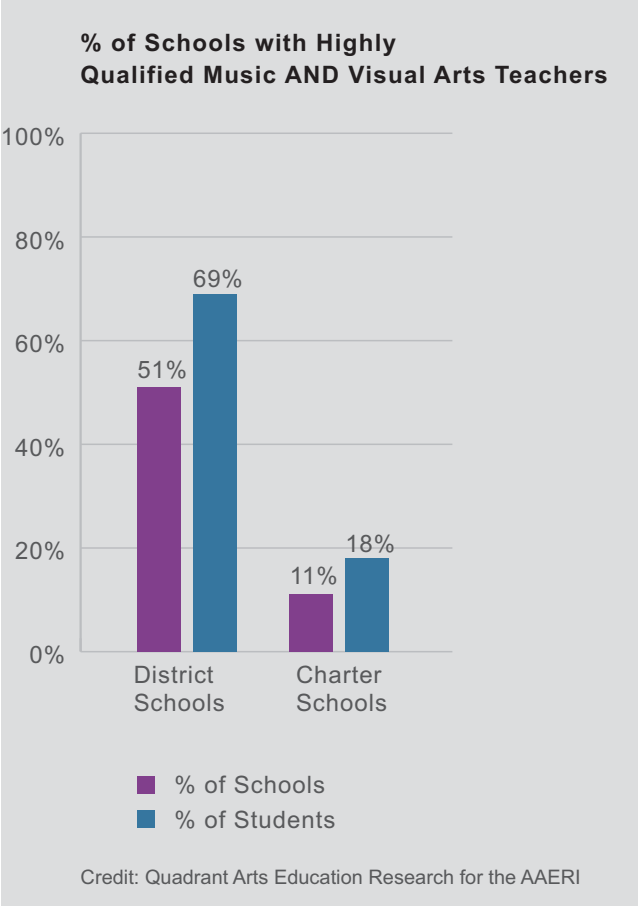
The federal definition of a Highly Qualified Teacher (HQT) is a specialist in the content knowledge of any specific discipline, in this case the arts. Highly Qualified Teachers hold at least a bachelor's degree, have obtained full state certification, and have demonstrated knowledge in the core academic subjects they teach. In Arizona, a teacher may not need full state certification if teaching in a public charter school.

Graph 5.5

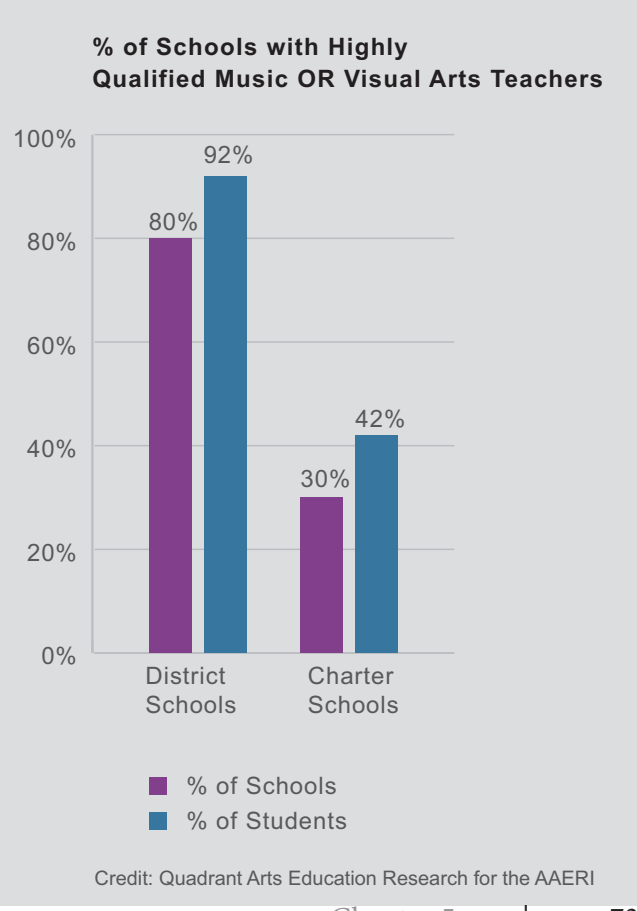


The number of District Schools without either a highly qualified Music or Visual Arts teacher is 288 (20%) with student enrollment of 77,504 (8%). The number of Charter Schools without either a highly qualified Music or Visual Arts teacher is 315 (70%) with student enrollment of 56,699 (58%). These graphs show the significant disparity in the percentage of schools using the Highly Qualified Teacher database in the arts when comparing District Schools to Charter Schools. This is a significant issue for Arizona (Graph 5.5, 5.6, and 5.7).

Graph 5.6



Graph 5.7



Rural vs. Urban:

When reviewing the presence of highly qualified teachers in Music or Visual art in relation to the geographic profile of a community the more rural the community the less likely there was a HQT in the arts. Suburban schools were most likely to have at least one Highly Qualified Teacher in the arts.

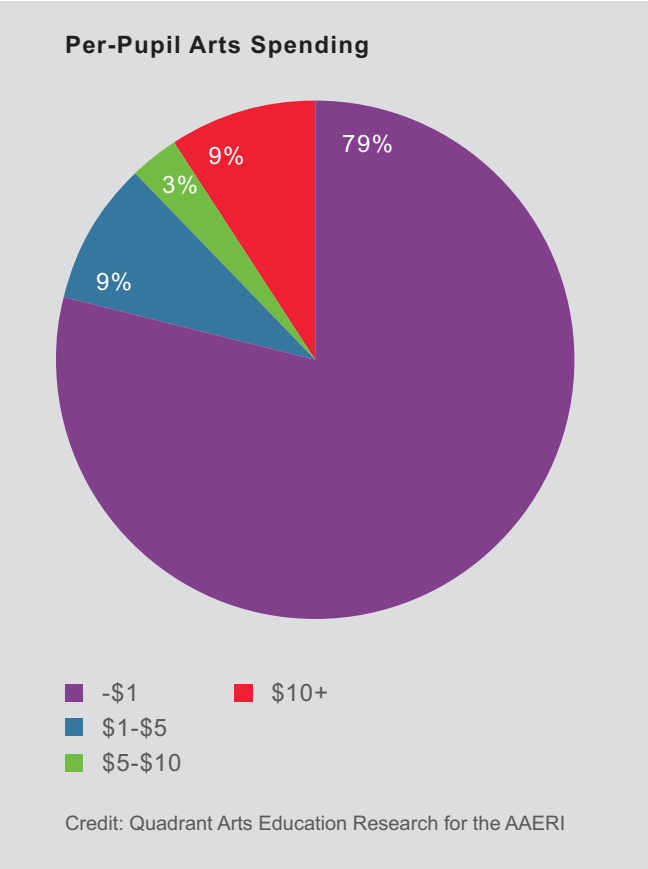
Instructional Time:

Students in elementary schools receive Music and Visual Arts instruction for an average of 55 minutes per week. In contrast, Dance and Theatre never exceed an average of fifteen minutes per week. 24% of Elementary Schools offer music for at least one hour per week while 19% offer visual arts for one hour per week.

Arts Enrollment in Elementary and Middle Schools:

General Music and General Art are the two main classes students participate in at the Elementary and Middle School levels. Chorus is the next most popular followed by Band. Orchestra, Dance, and Theatre have little student enrollment with only 1% to 2% of students participating.

Graph 5.8



Arts Enrollment in High Schools:

At the High School level changes in enrollment appear. General Art is the most popular course followed by Dance, Band, Drawing/Painting, and Theatre. There are more students enrolled in Dance at the High School level than there are in Band, Orchestra, or Theatre This is in spite of the fact that more schools offer Music instruction than Dance. The lack of entry level Music courses at the High School level creates a barrier for student participation.

Per-Pupil Arts Spending

Per-pupil arts spending (defined as funds allocated to curricular support materials for the arts divided by student population) is a direct predictor of higher or lower levels of arts education. 79% of schools spend less than $1 per year per student for arts instruction or less than 1/2 of 1 cent per day per student (Graph 5.8).

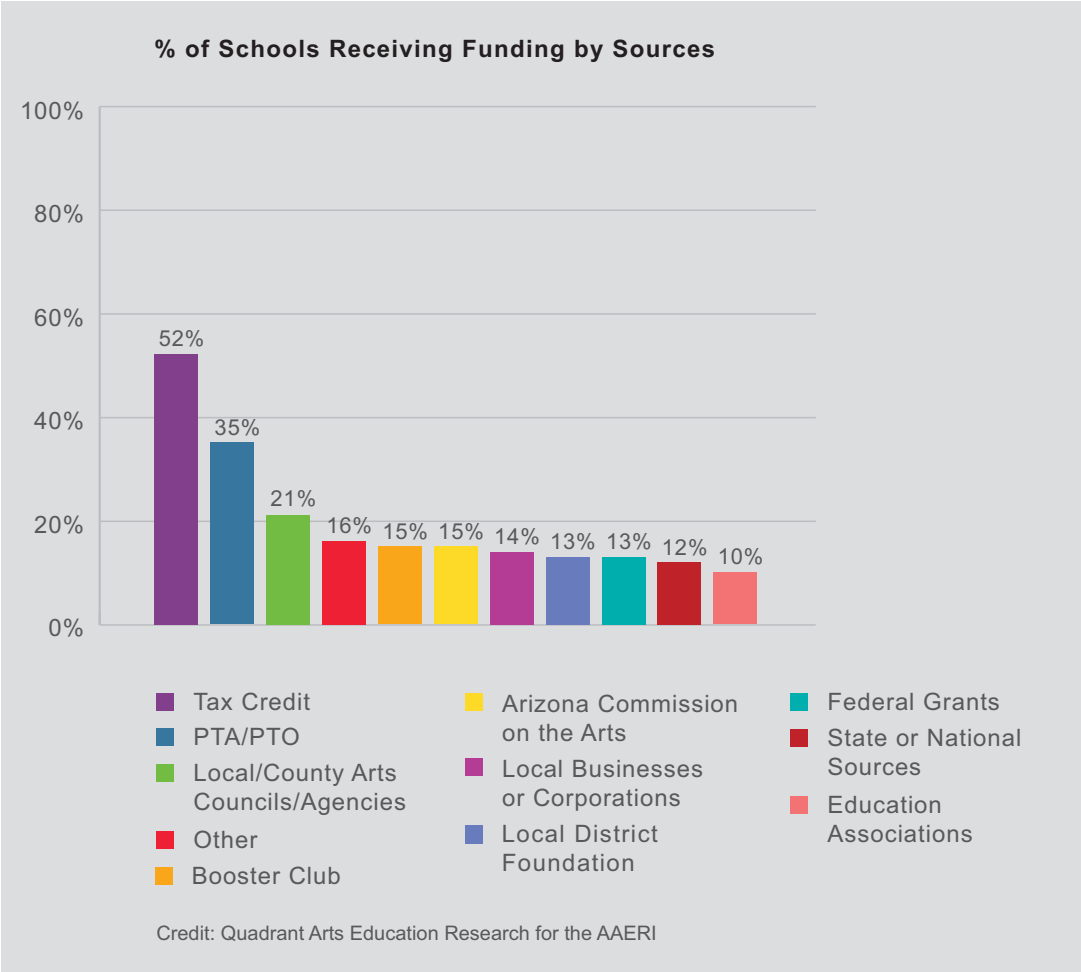
Budget Allocation:

50% of schools reported having no budget allocated for curricular support materials and supplies for arts education (excluding teacher salaries and one time capital expenses).

External Resources:

All schools reported receiving funding from non-district/charter school sources. The tax credit was the most significant source (52%), followed by Parents Groups (35%), and county/local arts agencies (21%) (Graph 5.9).

Graph 5.9



Arizona Arts and Cultural Resources in Arts Education

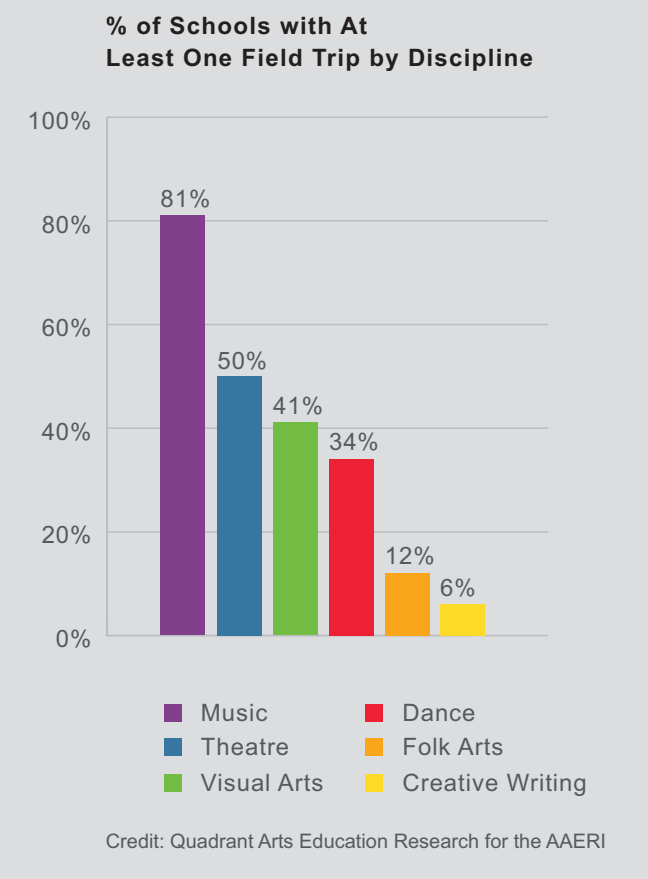
When ensuring all students have access to an education in the arts, Arizona arts and culture organizations play a role in providing supplemental arts experiences to the school day. High quality experiences support standards-based curriculum, working in partnership with a school to meet their mission and establish clear evaluation and assessment protocols to meet the needs of students, teachers, and community partners. These services, however, serve as a supplement and do not, nor should they, replace a standards based sequential instruction provided by a highly qualified arts specialist in the classroom.

Arizona public schools are providing frequent exposure to professional artists and arts events via field trips even as the current economic downturn began to impact school budgets.

% of Schools Participation in Arts Field Trips:

75% of all schools offered at least one field trip to arts exhibitions, performances, or events within the past three years (2007-2009). Of those schools participating in arts field trips music is the most popular subject (81%), followed by Theatre (50%), Visual Arts (41%), Dance (34%), Folk Arts (12%), and Creative Writing (6%) (Graph 5.10).

Graph 5.10



Barriers to Participation in Arts Field Trips:

Of those schools who have not participated in arts field trips in the past three years the number one barrier (45%) to participation was identified as "budget constraints." However, 26% identified "lack of information" as the main barrier and 47% reported "no obstacles" to participation.

Multi-Year Partnerships:

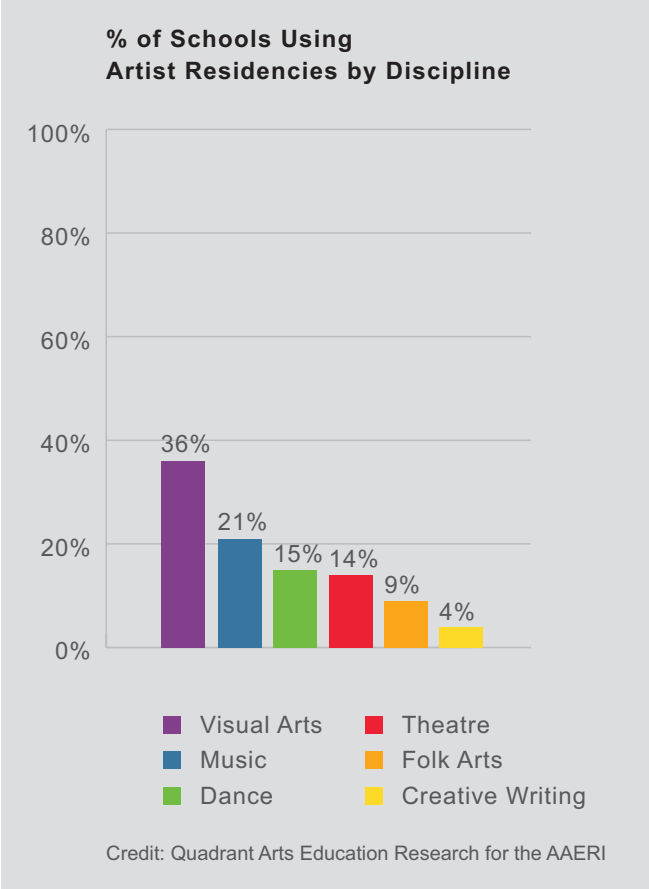
Taking an opportunity to deepen learning opportunities with arts and culture organizations, 57% of schools have formed partnerships with one or more community-based arts organizations. This is significantly higher than in similar state studies across the country. Partnerships of classroom educators, arts specialists, and community arts resources (artists and arts organizations) are playing an integral role in helping to design and deliver arts learning programs that serve the interests and needs of individual schools. In addition, these partnerships are occurring with social service organizations and communities.

Teaching artists are an additional resource in the delivery of arts education. The role of the teaching artist is an integral part of the broader arts education framework, which includes: residencies, arts experiences, performances by professional artists, integrating the arts throughout the curriculum, discipline-specific learning in the arts (visual arts, dance, theatre, music, poetry, etc.), and lifelong learning in the arts through community arts events, classes, and workshops. Teaching artists provide a tangible link between the creative process and learning.

Use of Artist Residencies:

37% of all schools use some type of Artist Residencies. Visual Arts (36%) is the most popular discipline for Artist Residencies, followed by Music (21%), Dance (15%), Theatre (14%), Folk Arts (9%), and Creative Writing (4%) (Graph 5.11).

Graph 5.11



Arizona Arts Education SUPPORTERS

Important steps toward strong arts education policy have been taken in Arizona. The policies create a clear vision of expectations for arts education and a strong foundation for students as they move into postsecondary learning and the workforce. They point out that Arizona has decided that a quality education for all children includes the arts for their intrinsic value, how they illuminate other subjects, and their academic rigor. To ensure that the gap between arts education policy and practice is addressed, further engagement with state and local entities and the active participation of arts education advocates, artists, students, parents, school administrators, cultural organizations, and business and community leaders will be required.

For further reference:
Engaging Students, Supporting Schools, Accessing Arts Education: Highlights from the Arizona Arts Education Census Project (2010)
http://azarts.gov/artsedcensus

Mandy Buscas joined the Arizona Commission on the Arts team in November, 2002. As Director of Arts Learning she supports the design and delivery of arts learning and integrated arts learning in schools, communities and organizations throughout the state. She administers the Arts Commission's policy, staff, grants and panel reviews in arts based learning; develops significant programs with ongoing resources and content; liaison and conveys information to the field of arts educators, classroom educators, teaching artists and education administrators of arts and culture organizations; and designs professional development offerings and statewide conferences in arts based learning. Additionally, she oversees the Commission's juried roster of teaching artists and manages operating support grants to statewide arts education organizations. Ms. Buscas has served the community as an educator, youth theatre instructor, museum educator, registrar, historian and grant panelist. She currently serves on the board of the Mesa Historical Society/Museum and the Museum and Cultural Advisory Board for the City of Mesa. She has presented on arts based learning locally for the Museum Association of Arizona, Arizona Art Education Association, Arizona Center for Afterschool Excellence and nationally for the National Assembly of State Arts Agencies, National Dance Education Organization and the Arts Education Partnership. Ms. Buscas holds a degree in Art History from Arizona State University.

Lynn Tuttle is Director of Arts Education at the Arizona Department of Education. Her duties include managing a multi-million arts education initiative; acting as a liaison to the state's arts educators; providing professional development in arts education; revising the Arizona Academic Arts Standards; and advocating for quality arts education programs in Arizona's public schools. She has presented at Americans for the Arts, Arts Education Partnership, the National Art Education Association Conference, the National Dance Education Organization and the Music Educators National Conference. Lynn serves as Treasurer for the State Education Agency Directors of Arts Education and is one of the leaders of the revision of the National Arts Standards. Lynn holds degrees from the Peabody Conservatory of Music (valedictorian), the Johns Hopkins University and the W.P. Carey School of Business at Arizona State University.

4 Mark Klett and Byron Wolfe, *Details from the view at Point Sublime on the north rim of the Grand Canyon, based on the panoramic drawing by William Holmes* (1882), 2007 Digital inkjet print. Dimensions: 24”h x 96”w. Sources:
William Henry Holmes, 1882. Sheets XV, XVI, XVII. *Panorama of Point Sublime*. From Clarence Dutton, *Atlas to Accompany the Monograph on the Tertiary History of the Grand Cañon District*. (Courtesy of the Library of Congress).

Chapter 6

Tourism and Cultural Heritage: Opportunities for Arizona

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Key Points

- Arizona is one of the most important cultural destinations in the United States
- Arts and culture are critical to the state's tourism economy
- Arizona's economy is highly dependent upon tourism for jobs, regional income, and tax revenues
- Arizona is in the upper rankings of states with federally-managed cultural resources
- Cultural tourism can empower communities socially, economically, and politically, while building community pride

Introduction

For centuries, humans have traveled in search of cultural experiences. History indicates that elites of the ancient Egyptian and Roman empires even traveled throughout the known world of the time to visit heritage sites of critical acclaim and to experience the cultural diversity of their geopolitical realms. Among the earliest travel patterns known today as forerunners of contemporary tourism are medieval religious pilgrimages. Later the Grand Tour, between the mid-1600s and mid-1800s, was comprised of aristocratic young men traveling to the famous art cities and high culture capitals of Europe to become cultured members of society. All of these predecessors of modern tourism had cultural heritage at their core.

Living culture and built heritage are two of the most salient resources upon which much of the world's tourism is based today. Billions of international and domestic trips are taken every year as people search for something different from their ordinary lives. Much of this travel is motivated by a desire to experience cultures, arts, historic buildings, and heritage monuments. There are many places in the world that have become well-known heritage tourist destinations. As well, many rural and urban areas in the United States have evolved into prominent heritage destinations for their national/patriotic past, government functions, arts and handicrafts, museums, and indigenous cultures. Arizona is one such locale, where culture-based tourism is one of the most salient economic sectors in the state. This chapter describes the phenomenon of cultural heritage and tourism in Arizona, its resources and demand, and how it contributes to the state's economic and social well-being.

National Trust for Historic Preservation

Cultural or heritage tourists are those interested in the particular culture of a region or country, including the lifestyles, history, art, architecture, religion, and other distinctive elements that shaped the character of rural and urban areas. America's National Trust for Historic Preservation has a Heritage Tourism Program, and its website defines cultural heritage tourism as "traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past and present. It includes cultural, historic and natural resources." It notes five principles for successful and sustainable cultural heritage tourism (http://www.preservationnation.org/issues/heritage-tourism/):

- Collaboration
- Find the Fit
- Make Sites and Programs Come Alive
- Focus on Quality and Authenticity
- Preserve and Protect

Heritage Tourism: Arizona Perspectives

Researchers have defined heritage as anything inherited from the past that is utilized today. Thus, history is the past, but heritage is the contemporary use of the past, including for tourism, education, and conservation.[1] Cultural heritage (as opposed to natural heritage) includes both tangible and intangible elements of the human past, and in most cases encompasses buildings, ancient ruins, music and dance, historic monuments, folklore, battlefields and graveyards, artworks and craft traditions, performing arts and their venues, farms and villages, religious sites, museums, industrial archeology, and cultural events and festivals. These and other resources are the foundations of much of the world's tourism appeal.

Researchers have identified two primary types of cultural tourist, namely those who pursue heritage places and experiences as serious enthusiasts, and people who simply utilize heritage on the side when they travel for other purposes (casual visitors). From a pure economics perspective, there is little difference between these two types of cultural tourist, because both have enormous economic impacts on the destinations being visited. However, serious heritage tourists tend to be better off financially and better educated, and they have a tendency to spend more per day in the destination than other types of tourists.[2]

Of the estimated 880-925 million international trips taken annually in recent years, approximately half involved visits to cultural heritage sites.[3] Some 55 million international visitors arrived in the United States in 2009, many of whom visited America's important historic sites and cultural centers. In its 2005 cultural heritage study, the U.S. Department of Commerce found that more than 10.6 million foreign tourists in the United States visited historic sites and cultural events while they were here.[4] Roughly 1.9 billion domestic person-trips were taken by Americans in 2009.[5] The U.S. Department of Commerce also estimated that 81 percent of all Americans traveling within the United States visited at least one historic site and participated in a cultural event during their vacation in 2005.[6] While some of these data are a few years old, they are useful in gauging the importance of cultural heritage as a tourism resource in the United States.

In common with many parts of the country, heritage sites are an important feature of Arizona's cultural landscape, and tourism based on this heritage plays a crucial role in the state's economy. Unlike some states, however, Arizona has almost every kind of heritage attraction imaginable.[7] Researchers prefer to categorize tourism phenomena into typologies, or classifications, for a variety of reasons. Understanding different subtypes of heritage tourism enables destination planners and managers to identify niche markets that could be targeted for promotional endeavors. Social scientists who research tourism are better able to collect and manage data, and develop theories pertaining to both supply and demand. In heritage tourism studies, we often break the product down into individual resource types for the reasons noted above. The following subsections examine in more detail various types of cultural attractions and provide examples from Arizona to help contextualize cultural heritage tourism. It should be noted that these categories are not exhaustive, nor are they mutually exclusive. For example, historic buildings might also be categorized as religious sites or museums.

Archeological Sites and Ancient Monuments

Archeological sites, including ancient ruins, are one of the most pervasive patrimonial resources for tourism. On a global scale, major icons stand out as prime examples, such as Machu Picchu, Stonehenge, the Great Wall of China, Angkor Wat, and Chichen Itza. Arizona is also home to magnificent archeological sites and ancient monuments. Native American cultures have long thrived in the high and low deserts of what is today Arizona. Remnants of early civilizations are among the state's most precious cultural resources. The National Park Service recognized this fact early on with the establishment of several national monuments in the early 1900s. The protection of Casa Grande Ruins was established at the federal level in 1892. In 1918 it became a national monument. The ruins of Montezuma Castle were designated a national monument in 1906. Many such places, remnants of America's ancient inhabitants, exist in Arizona under the protection of the National Park Service, Arizona State Parks, various tribal councils, and even municipal governments (e.g. Phoenix's Pueblo Grande). These monuments attest to the vitality and ancientness of America's indigenous people and serve as a critical part of the historical setting of Arizona.

Museums

Even within this category there are dozens of kinds of museums, including, but not limited to, those focused on science, art, history, transportation, paleontology, and industry, as well as specialized forms such as children's museums, folk life centers/outdoor living museums, and even public archives. These are among the most pervasive urban tourist attractions, but they are also commonplace in rural areas as well, particularly as small communities have in recent years sought to distinguish themselves from others and emphasize what is unique about them.

There are hundreds of museums in Arizona, ranging from small community historical displays, to internationally-known museums that function as "anchor attractions" in Phoenix and Tucson. The Arizona Science Center, Heard Museum, the Phoenix Art Museum, the Tucson Museum of Art, and the Arizona-Sonora Desert Museum are among the state's most visited attractions and benefit significantly from their Phoenix and Tucson locations. Even living history museums are not unheard of. While differing in scale from their

counterparts in the east, such as Plimoth Plantation (Massachusetts) or Mystic Seaport (Connecticut), the Pioneer Living History Museum has become an important attraction near Phoenix that depicts many aspects of what life might have been like in the nineteenth century.

Arts and Performing Arts Centers

Among the world's top performing arts centers are the Sydney Opera House and the Grand Ole Opry, which have become important heritage buildings in their own right, and the performances that take place within them are an imperative part of the world's intangible artistic heritage. Arizona is no stranger to the performing arts. Arizona Classical Theater (Prescott), Orpheum Theater (Flagstaff), Elks Opera House (Prescott), Borderlands Theater (Tucson), Chandler Center for the Arts, Phoenix Symphony Hall, Phoenix Art Museum, and the University of Arizona Museum of Art are just a handful of the many music, dance, symphony, and art centers and spaces in the state. Many of Arizona's cities and towns have their own dinner theaters, stage theaters, art galleries, and music centers. These are especially popular for local visitors, but many of them also draw tourists from out of town.

Historic Buildings

Historic buildings are an important part of the tourism environment everywhere. Arizona is home to many structures of international and national acclaim that create part of the state's heritage appeal. Frank Lloyd Wright's Gammage Auditorium, Taliesin West, Soleri's Arcosanti, the El Tovar Hotel at the Grand Canyon, and La Posada in Winslow are prominent examples. Historic buildings in Tombstone, Tucson, Phoenix, Flagstaff, and many of the state's smaller cities also contribute to creating a heritage appeal, which in conjunction with other cultural sites, draws tourists to the state.

Living Culture

Perhaps the most visible element of living culture in Arizona is the diverse traditions of Native Americans. With 22 federally recognized tribes, there is a rich array of cultures that are commonly shared with tourists. Native American arts and crafts, as well as cowboy culture and poetry, are significant aspects of living culture in the state and are a huge draw for tourists. These range from commercialized cultural performances in casinos, to more traditional ceremonies on reservations. Cultural interpretive centers and festivals are used by several tribes to disseminate cultural information to tourists. Travelers from all over the world have an interest in observing indigenous cultures, architecture, lifestyles, and performances in Arizona.

Religious Sites

Sites of spiritual or religious importance are an element of Arizona's cultural heritage that is often ignored in promotional literature and in public perception. The historic Spanish missions of southern Arizona are part of the state's colonial heritage but are relevant to its religious past and present as well. Several religious sites have resulted from Mormon pioneer history, including the LDS Temple in Mesa and newer temples in Snowflake and Thatcher. The Shrine of St. Joseph of the Mountains in Yarnell is a pilgrimage destination for Roman Catholics, who pray and follow the Stations of the Cross. Historic churches in downtown

Phoenix, the Tucson area, and other Arizona cities provide an additional heritage appeal for tourists. Likewise, Sedona is uniquely considered the "New Age capital of the world," where thousands of spiritual pilgrims converge each year to experience earth's energies, praise Gaia (earth goddess), and participate in Native American rituals at the location where, according to New Agers, the planet's powers are most concentrated.

Industrial Archeology

Although Arizona's economy has long been dependent on various extractive industries and manufacturing, the most persistent of these has been mining. Arizona produces more copper than any other state in the nation, in addition to many other non-fuel minerals. Mining has a long and folkloric history, and most of the state's industrial heritage derives from the mining past. Goldfield Ghost Town and Mine caters to visitors along the Apache Trail. Tours of the Queen Mine in Bisbee allow visitors to try to find their own pieces of copper, silver, gold, or turquoise. With the decline in heavy industry, Rosemont Copper Mine, the Vulture Mine, and sundry other mines throughout the state are now involved in tourism as a way of boosting their bottom line and improving relations with surrounding communities. Sites relating to science and technology are also important, and include the Biosphere, and the Kitt Peak and Mount Graham observatories.

War and Sites of Human Suffering

There is a current trend in tourism to visit sites associated with death, human suffering, and war. Arizona even has this type of heritage attraction. One of the most interesting is the area around Picacho Peak, where the Civil War's westernmost battle took place in 1862, when most of southern Arizona (then New Mexico Territory) was on the side of the Confederate States. The area of Picacho Pass is marked with plaques and markers interpreting the events of that fateful battle, where only a few soldiers were killed. Every year in March, the battle is reenacted by Civil War enthusiasts at the foot of Picacho Peak. Another site of interest is the location of the Second World War Japanese Internment Camp in Poston. The area is indicated with a large memorial marker, photograph displays, and interpretive media. North of the marker, some of the original camp buildings can still be seen alongside the highway. A second internment camp was located on the Gila Indian reservation, but this one is not considered accessible to tourists.

Literary Heritage Places

Literary heritage broadly refers to places associated with literature figures, novels, plays, or movies. Arizona is replete with such locations that have become a salient part of the cultural landscape. Much of the tourism success of Tombstone can be attributed to the town's prominence in books, television, and Hollywood productions. Many westerns and other popular movies have been filmed over the years in Arizona, and current movie location guides, online and in book form, highlight a considerable number of places in Arizona where movies have been filmed. Literary places associated with the lives of famous authors, such as Zane Grey, also play a part in the existence of literary tourism. Oak Creek Canyon, where most of his *Call of the Canyon* was written, and the Zane Grey Cabin in Payson are important stops on literature pilgrimages. The nineteenth-century American poet and storyteller, Sharlot Hall, has brought visibility to Prescott, home of the Sharlot Hall Museum.

Heritage Trails

Finally, heritage trails have found currency in today's tourism market. Themed large-scale trails exist throughout the country, linking cultural sites together into a single, linear product. Several of these exist in Arizona. The Dominguez-Escalante Trail runs near the northern border of the state, documenting the route used by early Spanish explorers in their efforts to find a way between Santa Fe and California. The Old Honeymoon Trail follows the route most commonly used by Mormon pioneers in their migration to Arizona. The Juan Bautista de Anza National Historic Trail, is administered by the U.S. National Park Service and runs from Nogales to Yuma and into California. There are several other important historic trails, Scenic Byways and routes (e.g. Route 66) linking the state's natural and cultural assets.

Cultural Tourism Demand

The sections above illustrate the rich cultural heritage that helps make Arizona a desirable tourist destination. As already noted, there is considerable demand for Arizona's cultural elements, and they are critical to the state's tourism economy. Table 6.1 illustrates visitor numbers at Arizona's National Park Service cultural properties in 2009. With 2.4 million visits, these sites are an essential part of tourism in the state, and place Arizona in the upper rankings of states with federally-managed cultural resources.

Table 6.1. NPS properties in Arizona with cultural heritage as primary focus[8]

National Park Property	Number of Recreational Visitors, 2009
Canyon De Chelly National Monument	826,425
Casa Grande Ruins National Monument	76,350
Coronado National Memorial	106,409
Fort Bowie National Historic Site	9,641
Hohokam Pima National Monument*	n/a
Hubbell Trading Post National Historic Site	99,267
Juan Bautista de Anza National Historic Trail**	n/a
Montezuma Castle National Monument	601,465
Navajo National Monument	77,901
Old Spanish National Historic Trail**	n/a
Pipe Spring National Monument	49,433
Tonto National Monument	60,534
Tumacácori National Historical Park	40,637
Tuzigoot National Monument	106,250
Walnut Canyon National Monument	128,299
Wupatki National Monument	233,284
Yuma Crossing National Heritage Area	n/a
Total	2,415,895

* Currently closed to the public
** Trail use is not counted by the NPS

Table 6.2 depicts similar criteria at culture-oriented state parks. While under 300,000 visits were made to Arizona's historical state parks in 2008, the economic impact was notable. Over 35 million dollars were generated by historical state parks in 2008 in terms of direct, indirect, and induced spending. Likewise, almost 500 people were employed directly in the parks' daily operations, not taking into account the indirect and induced employment created via economic multipliers.

Table 6.2.
State Parks properties in Arizona with cultural heritage as primary focus[9]

State Park Property	Number of Visitors, 2008
Fort Verde State Historic Park	15,992
Homolovi Ruins State Park	15,200
Jerome State Historic Park	60,114
McFarland State Historic Park	4,945
Riordan Mansion State Historic Park	26,209
Tombstone Courthouse State Historic Park	52,588
Tubac Presidio State Historic Park	12,835
Yuma Quartermaster Depot State Historic Park	11,676
Yuma Territorial Prison State Historic Park	67,851
Total	267,410

Table 6.3. Arizona's top non-public/private heritage attractions[10]

Attraction	Number of Visitors, 2009
London Bridge	2.5 million
WestWorld of Scottsdale	600,000
Tombstone	500,000
Rawhide Western Town	428,000
Arizona Science Center	364,000
Grand Canyon Railway	289,000
Arizona LDS Temple and Visitors Center	271,000
Scottsdale Center for the Performing Arts	236,000
Phoenix Art Museum	201,000
Heard Museum	180,000
Tucson Museum of Art and Historic Block	176,000
Pima Air and Space Museum	145,000
Verde Canyon Railway	89,000
Lowell Observatory	80,000

Several million tourists and recreationists visit the top cultural attractions in the state each year. Again, though, this does not include the thousands of other heritage attractions that are not listed in the top 14. In addition to the private, state-operated, and federally-operated cultural sites in Arizona, there are more than 1,400 properties and buildings listed on the

National Register of Historic Places, encompassing sites in every county in the state. While total use of these sites is virtually impossible to calculate, they too contribute to the considerable resource base of Arizona that makes it one of the most important cultural destinations in the United States.

Conclusion

Tourism has long competed with agriculture and mining as one of the leading industries of Arizona. The economy of the state is highly dependent upon tourism for jobs, regional income, and tax revenues, which help support education, public works, health care, and other public services. The state's cultural heritage is an extremely important part of its tourism offering, and the diversity of heritage elements is remarkable, ranging from indigenous and settler heritage to heavy industry and farming. Living culture and the arts are also a salient ingredient in the cultural tourism mix. In addition to being important to the state economically, cultural heritage-based tourism has the ability to enrich the lives of Arizona's citizens. Cultural tourism can empower communities socially, economically, and politically. It builds community pride in the cultural past and creative present, contributing to Arizona's social and economic well-being.

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1 D.J. Timothy and S.W. Boyd (2003) *Heritage Tourism*. London: Prentice Hall.

2 Ibid.

3 UNWTO (2006) *Compendium of Tourism Statistics*. Madrid: World Tourism Organization.

4 U.S. Department of Commerce (2005) *Cultural and Heritage Tourism in the United States*. Washington, D.C.: US Department of Commerce.

5 U.S. Travel Association (2010) *US Travel Forecasts*. Washington, D.C.: U.S. Travel Association.

6 U.S. Department of Commerce, op. cit.

7 G.P. Nyaupane and D.J. Timothy (2010) "Heritage Awareness and Appreciation Among Community Residents: Perspectives from Arizona, USA," *International Journal of Heritage Studies*, 16(3): 225-239; G.P. Nyaupane, D.D. White, and M. Budruk (2006) "Motive-based Tourist Market Segmentation: An Application to Native American Cultural Heritage Sites in Arizona, USA," *Journal of Heritage Tourism*, 1(2): 81-99; A.A. Lew and G.A. van Otten (1998) *Tourism and Gaming on American Indian Lands*. New York: Cognizant.

8 National Park Service (2010) NPS Stats. Available at http://www.nature.nps.gov/stats/park.cfm

9 Arizona State Parks (2010) Estimate of In-State vs. Out-Of-State Visitors. Available at http://www.azstateparks.com/publications/index.html.

10 Arizona Office of Tourism (2010) *Arizona 2009 Tourism Facts*. Phoenix: Arizona Office of Tourism.

Chapter 7

Placemaking and Social Capital: The Drivers of Wealth and Culture

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Key Points

- Members of the Creative Class prefer living in lively diverse communities that support commerce, the arts, and a wide range of cultural opportunities.
- Social Capital's importance suggests a shift of measures from monetary loss or gain to the arts of life as well as the activities of purpose.
- Layers of society's institutions and organizations (big and small) and the habitats they need for shelter and activity enable the value of Social Capital to grow.
- When we design and build new places, we are too often guessing at what might work better than what went before.
- New parameters for measuring what we do could inform better solutions and change the way we regulate our built environments.
- The adaptive re-use of older buildings in downtowns with culture built in, encourages more sustainable lifestyles where residents can live, work, and play in one area without long commutes.
- Many of our built environments have a negative impact on our culture, social life, and well-being.

Arts and culture contribute to a strong sense of place and flourish in diverse communities with distinctive visual texture. Arizona would benefit from a more diverse array of lifestyle opportunities, including those in urban settings with access to public transit. Single-family suburban homes whose residents are automobile dependent should not be the only residential option. This chapter considers some of the key cultural, environmental, and economic aspects of creative communities.

Introduction

Today, the word "culture" just on its own has more to do with a coffee shop located in a funky old house than it does the symphony. Main streets and downtowns across the country are experiencing great revivals because people are rediscovering the social lifestyle that comes with knowing one's neighbor, walking around a neighborhood, and actually knowing the shopkeeper or farmer; all key aspects of quality of life and healthy living. In addition, most of the people Richard Florida refers to as the "Creative Class" are drawn to vibrant, bustling places where ideas are openly shared, unique businesses are abundant, and new concepts are explored.[1] Architecture from the twenties through the sixties found in downtowns across Arizona tend to attract local business owners who want to be located in old buildings along walkable streets. In turn, when several shopkeepers align themselves together in a district of sorts, the density in itself begins to form a destination.

Across the country, certain communities emanate that sense of place that attracts creative new residents and visitors from around the world. Conversely, certain cities are lamented as places with no soul. Arguably, a city thought to have no soul is simply lacking in its place-making design components. Like growth in the economy, city growth to accommodate increasingly mobile populations was a top priority for decades. Growth in a city like Phoenix, for example, was such a priority that design and consideration of the social, cultural, and economic dimensions of place were sacrificed. Zoning laws, along with planning and transportation regulations, were established to enable whole neighborhoods to be designed and built cheaply and quickly with little thought to the way those places would actually make people feel while living in them.

Walled off from each other in cars by day and by fences and garage doors at night, over time many people begin feeling isolated. Humans are by nature social, and therefore, the suburban lifestyle with homes literally miles away from any stores or other arts, commerce, or cultural activities has little appeal to the creative younger classes now taking the stage as this nation's new generation of entrepreneurs, artists, and professionals. They are well educated, well travelled, and have often direct experience of living in places in other parts of the world that are known for their vibrancy, diversity, and support of commerce, the arts, and a wide range of cultural opportunities—places where the value of Social Capital is very high and the resulting economies are varied and resilient. How will Arizona compete?

A Cornerstone of Social Capital: Habitat

For many years what we built for ourselves—how it is shaped, what it contains, how it supports our culture, and how it responds to climate—has often been relegated to the bottom of the pile as far as what is seen to be important to us and a happy, successful life. We have all seen—and many of us live with—the results of fifty-plus years of uncontrolled sprawl, highways slicing through neighborhoods, and the blighting of many areas of our cities, especially in Arizona. However, the upsurge of interest in repairing our cities and suburbs to make them better places is significant and worldwide, especially in the face of climate change, the prospect of a very different future for the world, and perhaps dramatic changes to the lifestyles we have come to know over the past half century.[2] But the future world we are all looking toward certainly doesn't have to be uncomfortable or a lesser place.

For centuries, the benchmarks of a society's success have focused almost exclusively on measures of monetary gain or loss, building on the rallying call of John Maynard Keynes in the 1930s to supercharge the capitalist system—for a limited time—in order to create wealth and eradicate poverty.[3] Even Keynes suggested that there are other things we ought to be concerned about, specifically encouraging and experimenting in the arts of life as well as the activities of purpose. He's speaking of what we call Social Capital. Building on this to some degree, David Halpern's work suggests that the success of our economies are impacted greatly—and largely driven by—the simple habits and interactions of everyday life—the basic ingredients of Social Capital.[4] Underpinning these simple interactions that take place by the many billions every hour of the day worldwide, are our urban and rural habitats; the physical spaces and places we inhabit and that in subtle and not so subtle ways impede or encourage the everyday interactions between people that make the world go round.

It is these layers of habitat and the resources needed to make them that link our built environment to our economic and social success. In order to develop better, more sustainable habitats for our species, it is important to illuminate the interplays between and the consequences of public policy, social capital, and the physical environments in which our society operates. In placing greater emphasis on identifying the simple ways in which our physical environments can be improved can make the average person's experience of our urban habitats a better one than is the case for many Arizonans today. In this way, it is possible to re-shape thinking and action that will result eventually in better, more sustainable habitats for us to occupy and thrive within.

Figure 7.1

The layers of society and habitats that drive wealth creation.

Diagram by Philip D. Allsopp.

It is possible to think of our human society as a layer cake (see Figure 7.1) beginning at the bottom with the natural resources of the planet on which we live and ending with the persistent strategic concerns that drive so many of our daily news headlines. If our built and natural environments are ravaged or blighted through some kind of neglect (benign or otherwise) to the extent that they can no longer function efficiently or support our varied cultures and endeavours at all scales, many other aspects of what we take for granted today as the world we know, would be significantly impoverished; the places we know, the park benches where some meet to talk—the funky coffee shop where the problems of the world are solved; the front porch where we can watch the world go by and think as well as watch the kids playing in the street. For many who become quickly disenchanted with seemingly pristine neighborhoods in the new suburbs or "planned communities" they've relocated to, it is perhaps the absence of certain physical things about where they live that tell them that the interactions, friendships, challenges, and opportunities they crave are going to be hard to find. Living behind garage doors—usually the most prominent feature on most houses—on streets with few sidewalks and little shade for our Arizona summers makes it very hard to meet neighbors or discover the nooks and crannies of the footpaths and short-cuts that make up the places we associate with home.

The silver lining in all of this is the old phrase "absence makes the heart grow fonder." Re-making the cities, towns, and neighborhoods in which we live out our lives by adding back the things we know are missing, should enable us to create great, attractive places in which to interact, meet, and live. As Arizona looks forward to a future where gas will be very expensive and people are actively seeking out places with "culture" built in, we must consider ways to ease the process to open new businesses in old buildings on main streets and in downtowns.

Termed "adaptive reuse," this kind of in-fill development
encourages more sustainable lifestyles where residents can live, work, and play in one area without long commutes. Older buildings tend to have more character than new ones, the environment benefits when we stop filling landfills with perfectly good buildings, and most importantly, older buildings bring the character for "culture"—an important aspect of Social Capital—to thrive. Without places that people want to be in, it's pretty hard to locate commerce and a host of cultural activities. Great places attract creative minds. Thus by remaking our physical surroundings, the value of our collective Social Capital will likely increase significantly, making it also highly likely that we will strengthen the value of our economy and its ability to create new wealth.

Shaping Who We Are: Regulating Land Use and Built Forms

For all of the "rugged individualism" that many say characterizes the typical Arizonan, we seem strangely accepting of the incredibly prescriptive regulatory straight jackets that govern how our towns, neighbourhoods, and streets are planned, designed, and built. A troubling side effect of these regulations is that they tend to create formulas for designing human habitats and land use patterns around going somewhere in a car rather than simply being in one place. Thus, over time, many critical aspects of human habitats that have been developed over many generations—patterns of building, placement and design of things like boundary walls, front porches, walls, gathering places and so on—disappear. Compare what the average small town

streetscape was like in 1940 with what we have today and we can easily see stark reminders of what happens when regulatory formulas take precedence over designing with Social Capital in mind.[5]

Figure 7.2

Figure 7.3

Figure 7.2 (top): Small town Iowa (1940) on the cover of Everett W. Kuntz and Jim Heynen, *Sunday Afternoon on the Porch: Reflections of a Small Town in Iowa, 1939-1942,* (Iowa City: University of Iowa Press, 2008).

Figure 7.3 (bottom): Suburbia, North Texas, 2003. Photograph by Philip D. Allsopp.

Generally, builders and developers have simply been following the letter of the law and the regulations with which their projects have to comply. In other words they have been benignly carrying out their work and running their businesses providing commercial and residential facilities for others to occupy. While some of the more enlightened developers and builders have been and remain extremely concerned about the quality of the places their projects create—the extent to which they encourage a sense of community and place, the featureless suburban sprawl that has occurred over the past fifty years in the United States is dominated by tracts of style-du-jour homes and malls that to so many of us—particularly our children—are devoid of magic, and lacking any sense of place.

Even for a country with plenty of historic places still in existence, speaking about the great Victorian train station, St. Pancras in London, for example, Columbia University Professor, Simon Schama observed in "A Crisis Too Good To Waste" that:

> [What we need are] … in other words, places and spaces that somehow can be given a transfusion of new social energy, multi-generational social energy, while preserving economic viability. St. Pancras is an absolute triumph in that respect. Not just because it's a beautiful station, and works, and is light. But because of the gentle Piazza Navona-like social commotion in that glorious shed. That's what we should be hunting for.
>
> Old buildings, or buildings that might turn into derelict skeletons like Flushing Meadows, are worth having a vision for. Not just because it might be cheaper, or because people somehow have a shared sense of what might be.
>
> It's my deep, instinctive belief that all children are wired for memory and narrative. Children want to be part of buildings that talk about where they have come from. They want to walk and live in those kind of places. And take their own children to them.[6]

So perhaps listening to and watching our children—and asking them how we should be remaking our cities and urban places—would yield tremendously valuable insights into what we ought to be doing next.

Measuring the Impact of What We Build

There is a rapidly growing body of evidence that many of our built environments often have a negative impact on our culture, social life, and well-being. This body of research, particularly in the public health field, links the built environment to major diseases such as obesity. In addition to things like stress and poor nutrition, inactive lifestyles feed this growing epidemic. Walkable places—adding back sidewalks and making the act of walking to and from school, for example, a pleasant one even in the scorching summers of Arizona, help people to lose weight and thus reduce the risks of obesity-related diseases such as diabetes. The Robert Wood Johnson Foundation's "Active Living Research" program, investigates obesity relationships with community design, physical activity, and time spent

in cars.[7] Their research found that each hour spent in a car per day was associated with a 6% increase in the likelihood of obesity and also found that each additional kilometre walked per day was associated with a 4.8% reduction in the likelihood of obesity.

Can we regulate for health, niceness, humaneness, or sustainability? Probably not in such direct ways, given our society's tendency to want to regulate "how" something should be done rather than the outcomes we are seeking. Such new codes would potentially create yet another set of prescriptive codes for harried builders and developers to deal with. Descriptive quantitative data about our built and natural environments could highlight much of what we've given up in our habitats and what we need to be building back into existing, as well as new places meant for us. These measurement tools and research could also enable the development of performance oriented codes in much the same way that energy codes and energy-saving measures set targets for designers and builders to achieve.

Perhaps through such efforts we could achieve a long sought-after and saner balance among commerce, culture, transportation, and environment in the habitats we design and build for ourselves. Perhaps then our built environment would become better understood as the not so invisible hand that shapes so much of who we are.

Building Arizona's Future

Arizona has several things going for it in the market to attract Creative Class entrepreneurs to our communities. First, the very "newness" of Arizona makes it an excellent place to test a new product, business, or idea. We are considered a representative cross-section of America and those in product development agree we are a great starting place for test marketing. Additionally, our land is still relatively affordable. An entrepreneur can find a building to buy, rather than leasing, which is really an attractive proposition to someone coming from, say, New York or Chicago. We also have superior outdoor living opportunities and world-renowned facilities like Sky Harbor International Airport and the Thunderbird School of Global Management.

Our weaknesses include not having enough diverse lifestyle opportunities. We have mastered single family homes, but we need a broader menu of distinct opportunities for creative individuals to live more urban lifestyles that may include mixed use developments, access to mass transit, safe bike paths, access to healthy and locally grown foods, and a vibrant nightlife that includes a local music scene, handcrafted brew pubs, larger-than-life chefs, and a lively arts district. Even dog parks and recycling programs score high marks and the "most desirable places to live" lists for workers under thirty. In addition, our municipalities have been slow to respond to the demand for in-fill and the re-use of older building stock. This sustainable trend could be encouraged and supported if city leaders would look to older cities like Philadelphia and Boston for ideas on how to keep existing buildings not only standing, but in use and vibrant.[8]

Arizona is at a turning point, which includes the arts and culture economy. State leaders in all fields need to consider how it may become a competitive state striving to attract an educated

workforce or if it will continue on the well-trodden path of the boom and bust cycle of sprawl, which studies have demonstrated decidedly does not attract the most creative people to settle in our communities. We now know, in hindsight, that a real estate boom involving explosive suburbanization, plunging urban densities, and the destruction of neighborhoods and the local commerce concentrated there, deprives higher education of the physical and economic environments that nurture and inspire students and faculty alike. Reversing suburbanization's trend and the incentives that drove it, is critical for creating a solid sense of place that offers diversity, unique experiences, and plenty of culture; attributes that are well known for attracting faculty and students in higher education, and the kind of people—of all ages—who invent new things, who build new industries, and create new jobs. The tools, the research, the know-how, and the passion to do it are already in place.

Kimber Lanning is an entrepreneur, arts advocate and community activist who works to cultivate strong, vibrant communities and inspire a higher quality of life in the greater Phoenix metropolitan area. Lanning is actively involved in fostering cultural diversity, economic self-reliance and responsible growth for Arizona. In 2003, Lanning founded Local First Arizona, a grassroots, non-profit organization dedicated to raising public awareness of the economic and cultural benefits provided by locally owned businesses. The organization has since mushroomed to over 1,800 members, and Lanning works extensively with city and state policymakers to create a supportive environment for entrepreneurs of all sizes. Along with an advisory board of dedicated, local business owners and civic leaders, Kimber pursues the dual goal of establishing vibrant and culturally unique businesses at the forefront of Arizona's identity, as well as creating a sustainable and healthy region through the implementation of diverse local economies. She works to inform, educate, and motivate consumers to support local enterprises, and encourages public policy that enables locally owned and operated businesses to thrive.

Philip D. Allsopp is a writer, speaker and activist about improving the Resilience of our Habitats, Communities and Commerce, the issue at the core of Transpolis Global, the organization Phil co-founded in 2009 with operations in the U.S., the U.K., and the Czech Republic, and serving clients worldwide. Phil was born and educated in the U.K., completing his undergraduate, graduate and post graduate studies at Kingston University, London, and the University of Wales Institute of Science and Technology. He moved to the United States in 1979. After completing his Masters in Health Services Planning and Design at Columbia University, Phil spent two years as a Public Health Service Fellow assigned to both the office of the Surgeon General and the Health Care Financing Administration in Washington, D.C. Returning to the private sector, he has spent most of his career focused on improving business and community resilience and effectiveness. He has held senior leadership positions in corporate America, with prominent management consulting firms as well as in the non-profit world, most recently serving as President and CEO of the Frank Lloyd Wright Foundation, based at Taliesin West in Scottsdale, and currently as Chairman of the Arizona Green Chamber of Commerce.

[1] Richard Florida, *Who's Your City? How the Creative Economy is Making Where You Live the Most Important Decision of Your Life* (New York: Basic Books, 2008).

[2] Shaun Chamberlin, *The Transition Timeline for a Local, Resilient Future* (White River Junction, Vt.: Chelsea Green Publishing, 2009).

[3] John Maynard Keynes, "Economic Possibilities for Our Grandchildren," in *Essays in Persuasion* (New York:W.W. Norton, 1963 [1933]): 365-373.

[4] David Halpern, *The Hidden Wealth of Nations* (Malden, Mass.: Polity Press, 2010).

[5] See Everett W. Kuntz and Jim Heynen, *Sunday Afternoon on the Porch: Reflections of a Small Town in Iowa, 1939-1942*," (Iowa City: University of Iowa Press, 2008).

[6] Simon Schama "A Crisis Too Big to Waste," address given in London to the Commission on Architecture and the Built Environment (CABE), 16 September 2009. His talk was on what history can teach us regarding national responses to austerity. http://www.cabe.org.uk/articles/a-crisis-too-big-to-waste

[7] See, Robert Wood Johnson Foundation, *Active Living Research: Building the Evidence to Prevent Childhood Obesity and Support Active Communities*: http://www.activelivingresearch.org/; L.D. Frank, M.A. Andresen, and T.L. Schmid, "Obesity Relationships and Community Design, Physical Activity, and Time Spent in Cars," *Journal of Preventive Medicine*, August 2004), 27(2): 87-96; and Otto Clemente and Reid Ewing (University of Maryland, National Center for Smart Growth), Susan Handy (University of California), and Davis Ross Brownson (Saint Louis University), *Measuring Urban Design Qualities to Walkability*, Final report prepared for the Active Living Research Program of the Robert Wood Johnson Foundation, July 2005.

[8] These issues have been fundamental to the mission of Local First Arizona. A non-profit organization founded in 2003, it represents a coalition of locally owned businesses that form the backbone of the Arizona economy and works to strengthen communities and local economies throughout the state of Arizona. Their website has considerable information regarding the Creative Economy, and its economic implications for Arizona, especially regarding the significant environmental, economic, and cultural benefits of strong local economies. Here are some highlights. For every $100 spent at a locally owned business, roughly $42 remains in the local economy, and $32 leaves. For the same $100 spent at a non-locally owned business, only $13 remains. National chain stores contribute to the homogenization of our communities. For every two jobs national retailers bring to a community, three jobs are lost as a result of local businesses closing down. Shopping at locally owned businesses generates up to 75% more tax for communities and state. Independent businesses raise the standard of living in local communities because they take their profits and buy products and services from other local businesses, thus creating more and more tax revenues needed for the community to thrive. Millions of dollars of tax revenue subsidies are given to national chains by financially-starved local governments that drain even more tax revenue from our community and state. Blighted empty shopping areas are created in your community when chain stores re-locate to a more lucrative shopping center, or leave altogether. Hundreds of big stores are abandoned each year across the United States. Independent businesses are unique enterprises that contribute to the character of our community by offering a more diverse selections of goods and services. Independent businesses provide service with a personal touch. It matters to them that you are satisfied and will come back again. Carefully planned predatory pricing practices have allowed national chains to establish virtual monopolies as they drive local competition out of business. And then they raise their prices. See: http://www.localfirstaz.com/ and *Local Works: Examining the Impact of Local Business on the West Michigan Economy*, a Civic Economics study for Local First, Grand Rapids, Michigan, 2008: http://www.civiceconomics.com/localworks/

Architecture:
Defining Our Sense of Place

Will Bruder
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Key Points

- Architecture is best measured in relation to the scale of the human and the scale of the landscape
- Architecture is a barometer of how a community expresses social change and renewal over time
- The history of Arizona's architecture offers lessons of community and sustainability
- Frank Lloyd Wright, Paolo Soleri, and a talented generation of mid-century moderns provided the innovative foundation of what is now termed the "Arizona School"
- A reinvigoration of our cities and neighborhoods calls for bold regional thinking, an understanding of the importance of the local, in-fill and alternative energy incentives

Architecture has a long and significant history in Arizona, and the profession remains an important part of the arts and culture community and a distinctive part of the state's creative economy. That our notable structures attract visitors from all over the world means that architecture is also an important part of cultural and heritage tourism. How does Arizona's unique architectural character add value to the lives of our residents and visitors and how can the urban fabric of its towns and cities help move our state forward in a distinctive and sustainable way?

In this chapter I will address these questions and suggest ways that we can protect and sustain our already unique heritage while embracing the challenges and opportunities of an ever-changing cultural and economic reality.

First a definition of terms to clarify the percepts on which my comments will be grounded.

What is Architecture?

The essence of architecture is evident in those structures of human activity that do not merely shelter our bodies but engage all our senses. Architecture challenges our intellect to view the world from a different perspective, a perspective that is grounded in the specificity of time and place. Architecture is a careful balance of the pragmatic and the poetic. It combines that which is functional, logical, and efficient with that which is indefinable, inspiring, and unexpected. Architecture is where the most ordinary of materials are configured in ways that transform them to make places of extraordinary resonance and memory, places where small visceral experiences are as significant as big ideas.

Architecture that is conceived to give the instant wow experience too often is only of its time, while architecture that truly aspires to be of its place and time is that which has the potential of becoming the timeless. Architecture should aspire to engage us, to be grounded in a real experience that wells up in us and takes us over, producing the 'whooshing up' described by Hubert Dreyfus and Sean Dorrance Kelly in their new book *All Things Shining: Reading the Western Classics to Find Meaning in a Secular Age* (New York: Free Press, 2011) While architecture is always best measured in relation to the scale of the human, architecture must also be appropriate to the scale of the landscape, both natural and manmade, that it inhabits and the velocity of the world in which it exists. Architecture always reflects how a culture views itself. It is a barometer of how a community expresses social change and renewal over time. Architecture is the most fragile of art forms, as evidenced by the many empty lots where buildings once stood in our cities and towns. Yet architecture leaves the most permanent markers of our cultural heritage.

What is an Urban Fabric?

While we often see the architecture of buildings as the key objects that make great cities, it is really the quality of the pedestrian realm, i.e. the sidewalks, the street edges, the landscape, and the spaces between the buildings that make cities enjoyable, accessible, and memorable. A sustainable urban fabric preferences people in its scale, texture, level of detail, and connectivity, not the velocity of the car. When the urban fabric is strong, neighborhoods evolve and thrive. Cities are but neighborhoods and experiences linked together, like a richly textured and animated three-dimensional quilt.

To understand where Arizona is as a place to live and visit it is helpful to survey our built history, a chronicle that holds the keys to understanding our identity and offers lessons we must appreciate as we go forward.

Arizona's Architecture: A Brief History

Arizona's architectural identity is built on a foundation of sustainable resourcefulness and invention. This ethos has been tried and tested in times of abundance and scarcity. The wonders of Arizona, its geologic history, varied flora and fauna, ever visible defining horizon, and nearly ideal climate have continued to speak of possibility and promise.

Consider as a first architectural invention the early wattle and dab pit houses and earthen and stone walled villages of Casa Grande and Snake Town, supported in the Gila and Salt River Valley by vast irrigation systems, systems that left indelible marks to this day, and perhaps an ominous warning about fragility (i.e. the unexplained disappearance of the Hohokam peoples). Add to these the stone ruins of Montezuma's Castle, Wupatki, Keet Seel, and Betatakin as well as the living village of Walpi on First Mesa of the Hopi Reservation. They all offer lessons of community and sustainability.

Further along in our time line came the 15th century adobe brick Spanish mission churches and garrison compounds. They were functionally pragmatic structures poetic in their directness of purpose and making, as were the later buildings in support of the ranches, mines, and farms of Arizona's first settlers in the mid-19th century.

Spanish land grants and the rigor of the grid plan so popular in the West progressively mapped the vast landscape, overlaying the varied topography of the young Arizona Territory. Trail and rail alignments grew and their intersections defined and placed the built forms that have matured into the towns and cities that we know today.

The modern water reclamation projects, the automobile, and the airplane as well as the development of mechanical cooling technology in the first half of the 20th century catalyzed Arizona's expansive growth and set the stage for the unique and respected character of its architectural identity.

Towns and emerging cities through their architecture started to reflect the pride, aspirations, and optimism of the successful residents and ambitious community leaders who migrated to Arizona. Prescott, Tucson, and Phoenix boasted vibrant main street downtowns by the 1920's. Phoenix alone could claim fourteen streetcar lines in its downtown in 1921. Through increasingly sophisticated communications news spread of Arizona's natural beauty and mythical identity. Photography, open-air painting, and journalism revealed and celebrated its spare and wondrously lush desert and varied geologic history. The quality of light, ever visible horizon, and nearly ideal climate caught the imagination and ambition of many who heeded Horace Greeley's advice: "Go west, young man. Go west."

To accommodate and cater to those coming to see the Southwest for themselves hospitality architecture began to emerge. Architect Mary Jane Colter designed for Fred Harvey at Williams, the Grand Canyon, and elsewhere; the gracious Arizona Inn in Tucson by Merrill Starkweather opened in 1929; and Albert Chase MacArthur and Frank Lloyd Wright, the mature internationally recognized master, collaborated in 1928 on the Arizona Biltmore Hotel in Phoenix. These and other early examples gave the state not a unified architectural style but a built reality that reflected the originality and energy of the place with its dramatically surreal landscape, its enticing climate, and the optimism of the adventure. These are the roots of the uniquely regional modern architecture of Arizona.

Indeed, Arizona's expansive central desert would serve as the canvas for Wright's hand and imagination as he conceived and modeled his sprawling utopian vision of Broadacre City (1929-1935). The idea of Broadacre City revolved around individual homes placed on plots of modest acreage serviced by futuristic cars and personal helicopters. His diagrams of settlement depicted in seductive drawings extended over buildable land as far as the eye could see. Conceived in the middle of the Depression but optimistic in spirit (every occupant master of his own turf, tilling his own garden), it proved prescient of the suburban reality and America's post World War II vision of itself. In the late 1940's, a combination of prosperity, population growth, and cheap, seemingly endless, buildable land connected by possible networks of freeways and shopping centers, as in Southern California, drove and dominated Arizona's growth. The single detached ranch home on its suburban lot would be the dominant model of residential growth throughout the second half of the 20th century throughout America, but particularly in the Sun Belt region.

However, while Wright conjured up a vision for urban growth in his Broadacre City plans, it was the memorable photogenic reality of Taliesin West (1936-59), his winter home and studio that would truly inspire the modern desert architecture that was to follow. Sited beyond the edge of the sleepy farm town of Scottsdale, at the base of the McDowell Mountains, Wright built a primal desert camp of rustic rubble rock and concrete walls whose angular folds and bends mimicked the mountains that seemed to embrace them and whose simple timber-beamed canvas roofs formed both an image of the ages and one as temporal as a desert mirage.

This architecture demonstrated what truly original desert living could be. It extruded itself cleanly from the land while kissing the sky with a crisp clarity of intent. On the cusp of Arizona's explosive growth, it provided a challenging model of abstraction and assuredness for all the Arizona architecture that would follow. It suggested a rethinking of possibilities and set down the first truly distinct built identity of the "new" Arizona. No longer mere shelter, these structures spoke to the power and potential of architecture in celebration of this place.

Adding to the mix of the investigations of Wright and his apprentice acolytes was the work of multiple young architects whose housing studies were put forward in the popular *Arts and Architecture* magazine's Case Study program of 1945-1966. Through this publication alone a new residential architecture was built, tested, and viewed by the eyes of the world. News spread of a new way of living in the West that celebrated the comfortable modernism of dwellings that grew from the inside out and the outside in. In harmony with both climate and lifestyle these experimental Case Study houses refined, and often combined with the heritage of the more traditional courtyard buildings of the region's Spanish heritage, to give our cities a fresh and appealing character.

From this period a distinct architectural style evolved that was particular to Arizona. New materials appropriate to the time and place made affordability and constructability common to not merely Arizona's residential architecture, but also to the civic, commercial, and industrial architecture of its communities. Thus the architectural legacy of Wright's Usonian experiments and the Case Study innovators was digested and refined by a generation of mid-century Arizona design leaders including Blaine Drake, Paul Schweikher, Ralph Haver, Al Beadle, Bennie Gonzales, Arthur Brown, Judith Chaffee, and many others. The image of "built Arizona" was spread far and wide through features in *Arizona Highways* magazine and a growing national and international travel and architectural press.

In the early 1960's, Arizona's architectural identity reached beyond the residential to its public libraries, community colleges, state universities, places of worship, banks/savings and loans, shopping centers, schools, hospitals, and industrial buildings. Now this work is being recognized for its historic value at the center of community preservation and understanding by a national mid-century modernist following.

With the prosperity of Arizona's growth sprawling in all directions, as Wright had divined it would be, his former apprentice, the young Italian visionary architect, Paolo Soleri redefined our considerations of the city through his drawings, models, and writings. From his

experimental Cosanti studio in Paradise Valley these ideas would come to full blossom in the large folio published by the Massachusetts Institute of Technology Press in 1970, *Arcology: City in the Image of Man* (arcology, a combining of the words architecture and ecology). Beyond a statement of philosophy the book illustrated Soleri's concept of three-dimensional sustainable cities growing efficiently from the landscape without need of the automobile. These vertical armatures demonstrated Soleri's thinking and suggested an approach that contrasted sharply with Wright's Broadacre City model.

In the built experiments at Cosanti, ordinary materials and ideas grew logically and in extraordinarily artful ways from the landscape of its desert climate. Simultaneous to making these built experiments at Cosanti, Soleri laid out in text and sketch his notions about future life imperatives: complexity, miniaturization, and durability. Before Earth Day was ever celebrated, before LEED certification was conceived, before the word "Green" was on everyone's lips, Soleri was wrestling with the issues of sustainability that concern us so deeply today.

In the last forty years the confluence of architectural talents set in motion by Wright's work, Arizona's ample stock of mid-century modern inventions, and Soleri's experiments have continued to influence, inspire, and form architecture in Arizona as we see it today. Indeed the "Arizona School" has been increasingly recognized for creating buildings uniquely appropriate to the climate and landscape, iconic in their use of materials and light. Overall prosperity and political vision have catalyzed the commission of ambitious civic buildings that have garnered national and international attention, including ASU's Nelson Fine Art Center and the Burton Barr Phoenix Central Library. From civic to university, residential to commercial, multi-family housing to mixed-use high-rise, architecture of widely recognized distinction and specific community pride has resulted. Indeed, Arizona has become a pilgrimage site for architects, designers, urbanists, and world travelers.

Something special has gone on here, and a maturing line of significant architectural inquiry and practice has been laid down. How do we insure that this "line" continues to be a calling card for our state, a point of pride for residents, and a point of destination for others seeking business or pleasure? I suggest that we move forward in ways that are both bold and fine-grained, but always appropriate to this place and intrinsically sustainable.

Some Key Issues and Questions

What might be the result of big bold regional thinking? Creative and thoughtful planning is important for urban, suburban, and rural communities in ten, twenty-five, and fifty-year increments. There will of course be overshooting and underestimating, but in order to deal effectively with population growth, a map of possible absorption that is better than "drive until you qualify," could offer better solutions for our future. Such a map could radiate with vibrant nodes of social and economic density, lively neighborhoods, and distinctive destinations linked by rail and road, bike paths and trail systems.

What is the value of "Local First"? Towns and cities across Arizona understand the value of "local." Supporting efforts to map, develop and mentor neighborhood based public markets,

unique retail, and restaurant opportunities based on local resources and benefiting local businesses will create sustainable communities. The more real it is the more we will want to be here and others will want to join us for a visit or for life.

What is the value of interconnection? The Internet and social media connect us on invisible highways. Interconnected neighborhoods will make it possible for us to actually show up, something we humans like to do and probably always will. Integrating light rail and bus is a great start, but let's also consider less expensive, pedestrian friendly contemporary railed streetcar loops at key junctions in our most vibrant neighborhoods. Tucson is leading the way, with Tempe in close pursuit, in demonstrating what railed streetcar connectivity can mean to a community. If the patterns of mixed use development seen in the downtown of Portland, Oregon, are any indicator, such an investment is catalytic to a myriad of economic and social benefits. From cities as varied as Flagstaff, Prescott, Scottsdale, Glendale, and Phoenix, the streetcar, not the freeway, would transform our lives with vastly improved time/space efficiency.

How can In-fill incentives be provided? There are many voids in our midst, and in-fill would help to create and strengthen the urban fabric of our towns and cities. Work with owners of big empty lots to "program" them for temporary uses while vigorously creating community visions and plan for their reuse for live, work and play. Let's not just stand by and wait. Let's not just react. Let's build value. Rather than building on a model of use based zoning that has stifled so many of our cities and neighborhoods let's embrace "form based zoning," which values a mixed use environment and puts within our, reach the 24/7 vitality that characterizes great places.

How may alternative energy be deployed? Such interventions and innovative shade structures, manmade or soil bound placed in highly visible places could contribute to livable communities: solar panels on parking lots, parasols on pedestrian ways. Dress them in graphics that quantify their "coolness" and "can do" attitude. These will reinvigorate the public realm at the heart of our cities and neighborhoods.

How can small be better? Small doable strategically sited, high-visibility, high-quality, locally-grown projects that immediately speak to our place and time and demonstrate that bigger is not necessarily better. By identifying the key places where making such an investment might be viable could inspire the confidence and optimism that is at the core of our heritage.

Tomorrow is Now

Arizona is still rich in opportunities and resources. They are close to home and demanding of our highest talents and deepest respect. Let's learn from our past failures and successes as we build a new, more efficient, livable, and beautiful network of neighborhoods and communities where architecture, culture, and the urban fabric complement the wonders of Arizona's unique and fragile landscape.

Will Bruder has explored inventive and contextually exciting architectural solutions in response to site opportunities and user needs for forty years. A craftsman in his concern for detail and building processes, he is also a sculptor in his unique blending of space, materials, and light. Self-trained as an architect, Will has a B.F.A. degree in sculpture from the University of Wisconsin-Milwaukee. Supplementing his studio education were studies in structural engineering, philosophy, art history, and urban planning, followed by architectural apprenticeships under Gunnar Birkerts and Paolo Soleri. After becoming registered, Will opened his own studio in 1974. With over 500 commissions, his work has celebrated the craft of building in ways not typical in contemporary architecture. Bruder strives to invent form specific to function and client aspiration, and through his creative use of materials and light, and his ability to raise the ordinary to the extraordinary is renowned. His architecture has been widely published and the seventy awards he has received over the course of his career have included the AIA Arizona Architect of the Year (2008), the Governor's Art Award (2004), Educator of the Year by the Arizona AIA (1996), and the Rome Prize Fellowship (1989). Recent teaching positions have included the Distinguished Visiting Professor of Urban Architecture, Portland State University (2009), Pietro Belluschi Visiting Chair in Architecture, University of Oregon (2009), Frank Gehry International Visiting Chair, University of Toronto (2006), William Henry Bishop Visiting Professor, Yale University (2003 and 2006), and Thomas Jefferson Chair at the University of Virginia (2001). Bruder has worked nationally and internationally, and among his best known Arizona buildings, are the Burton Barr Central Library (1995) in Phoenix, the Deer Valley Rock Art Center (1994), and the Scottsdale Museum of Contemporary Art (1999).

The Museum Heart (Scottsdale Museum of Contemporary Art, 1999)

Alberto Rios

We, each of us, keep what we remember in our hearts.
We, all of us, keep what we remember in museums.
In this way, museums beat inside us.

What we have seen and been fed,
What we have smelled and then wanted,
What hair we have touched
And what hands have touched our own;
What fires have burned red,
What rifles-fire echoes still,
What blue mountains rise
On the horizon's orange and gray spine;
What day-moon mornings, what June-beetled evenings,
Simple heat moving, finally, into simple coolness,
A single long drink of good water,
My mother's yes, your father's chin.

What we remember,
What we have remembered to keep,
Where we put what we keep:
Sometimes in buildings we find
Pieces of the heart.
Sometimes in a heart we find
The shelter of a building.

A Heritage at Risk: Historic Preservation in Arizona

Deborah Edge Abele
Historic Preservation Consultant

Key Points

- The Casa Grande ruins were designated the nation's first prehistoric and cultural reserve in 1892, the first foray into historic preservation by the federal government.
- Significant federal legislation included the National Historic Preservation Act (1966) and the Native American Graves Protection and Repatriation Act (1990).
- Their provisions were bolstered by state and local legislation in Arizona. Arizona voters passed a statewide citizen initiative to create the Arizona Heritage Fund to be funded from Arizona Lottery revenues (1990).
- By the beginning of the 21st century, Arizona had one of the best frameworks for the advancement of historic preservation in the nation.
- Studies have demonstrated the economic benefits of preserving historic buildings and areas.
- Proposition 207, passed in 2005 in response to government use of eminent domain, has had a negative effect on historic preservation.
- The recession has eroded state support for historic preservation, put the Arizona State Parks system at risk, and has threatened our fragile historic resources.

As we move toward the 2012 celebration of Arizona's first one hundred years, it is timely that we look at what we have done to preserve the buildings, landscapes, and artifacts that chronicle that history. While there are many accomplishments of which we can be proud, recent events threaten to undo the balanced protections and support that have been put in place to ensure that the cherished landmarks, historic downtowns and neighborhoods, and iconic symbols of our past eras endure.

Arizona was the last territory of the "Lower 48" to become part of the United States. Although the popular perception is that we are a young state and our future is more important than our past, Arizona actually has had, since its inception, a tradition of preservation. Like other states, Arizona's interest in preserving its history developed in tandem with its settlement.

When the Territorial Legislature's first session convened in Prescott in November 1864, among the handful of laws created was an act to charter the Arizona Historical Society. The Historical Society, the 1884 Society of Arizona Pioneers, and the Arizona State Museum were entrusted in the 1890s by the Territorial Legislature to foster care for the Territory and hold its collections and properties. Their creation evidenced the importance placed by early leaders in the documentation and preservation of the new settlement's history.

During the same time, Arizona was the site of the federal government's first foray into historic preservation. One square mile of the Territory surrounding the remains of a 13th century Hohokam farming village, was designated in 1892 by President Harrison as the "Casa Grande Reservation," the nation's first prehistoric and cultural reserve. This was over a decade before the enactment of the 1906 Antiquities Act, Public Law No. 59-209, which formalized protections for other nationally significant "historic landmarks, historic and prehistoric structures and other objects of historic or scientific interests" as National Monuments. The Act resulted in a mandate for the preservation of a substantial collection of sites on federal lands in Arizona.

In 1927 Arizona passed a similar state law, the Arizona Antiquities Act, ARS 41-841 to 41-846, which prohibited unauthorized excavation or defacing of historic, archaeological, or paleontological sites and the collection, alteration, or destruction of artifacts owned or managed by state agencies.

As the twentieth century progressed, Arizona saw the organization of numerous local historical societies and the creation of small museums filled with historic objects, photographs, papers, maps, and other memorabilia. The museums were intended to educate about the life and times of the settlers and instill pride about past accomplishments. Most were geographically based, while others focused on local industries and the role of the railroads and the military in the state's growth and development. They commemorated the contributions of important families or individuals and chronicled those of the state's many cultural, religious, and ethnic groups.

As the growth of tourism brought visitors to Arizona interested in the stories of "Cowboys and Indians," Native American museums and heritage programs were organized. Local historical societies and museums primarily rely upon private funding and support by volunteers. While their work is limited to preserving artifacts, historical accounts, and community traditions, they have been and continue to be a small, but nevertheless a mainstay of the state's preservation efforts.

In 1966, Congress passed the National Historic Preservation Act (NHPA). Arizona quickly joined other states in establishing the federal-state partnership and program directives of Public Law No 89-665. In 1967, Governor Sam Goddard designated the Arizona State Parks Director, Dennis McCarthy, to fill the required position of the "state liaison officer" with the federal government. This was a logical choice as the State Park Board Law of 1957 had given the Parks Board the responsibility for selecting, managing, operating, and developing areas of scenic beauty, natural features, and historical properties as state parks and historical monuments. Although federal appropriations for historic preservation were not available until 1969, McCarthy budgeted state monies for FY 1968-69 to draft enabling legislation for a state historic preservation program.

An Assistant Director of State Parks was reassigned to become the state's first State Historic Preservation Officer (SHPO) and a "Governor's Historical Advisory Commission" was appointed. Pursuant to the NHPA, an *Interim Plan for Historic Preservation* was completed in August, 1970.

At the national level, the initial focus was on completing a comprehensive inventory of the historic properties in each state and nominating properties to the newly created National Register of Historic Places (NRHP). The NRHP criteria for deciding what was historically or architecturally important was based upon criteria which had been crafted by a wide array of scholars and disciplines to guide the 1930s New Deal Historic Sites Survey program work to document the nation's most significant historic and architectural resources. Arizona had thirty-five properties recorded through this program. McCarthy worked with Arizona State University's School of Architecture to conduct a statewide inventory effort to identify additional properties eligible for listing on the NRHP and/or the Arizona Register of Historic Places. Not just limited to properties of national significance, this survey compiled information about districts, sites, buildings, structures, and objects of local, state, and regional importance as well. Incentives for historic preservation were soon added to supplement the State's survey and nomination efforts. The State Parks Board Law was amended in 1977 to allow for a special tax classification for designated historic properties that reduced or limited for a time period property taxes owed on the property.

The earliest local ordinance specifically related to historic preservation was in Tombstone in 1956. It was precipitated by the construction of a state highway through the town's historic center. In 1972, Pima County amended its Zoning Code to establish overlay zoning requirements to protect cultural resources within historic districts. The County's ordinance established a mechanism to define these districts and review demolition, new construction, and renovation plans for development that was funded by or under the direction of Pima County. The Tucson-Pima County Historical Commission was created in 1974. In 1985, Pima County's zoning policies for cultural resource protection were extended to apply to private sector development.

Concurrent with the expansion of the scope of the national historic preservation movement, preservation activities in Arizona grew as well. A statewide preservation group was organized in the late 1970s to advance advocacy and private sector involvement. During Bruce Babbitt's tenure as Governor, a task force was convened to assess how Arizona might benefit more from preservation activities which had increased the availability of affordable housing, the growth of tourism, energy conservation, and gave high rankings for the "quality of life" in communities in other states that had an enhanced identity that came from preserving a sense of time and place.

The 1982 Governor's task force's recommendations did not call for the creation of new institutions or agencies but sought instead to remove the barriers to effective cultural resource management. An immediate outgrowth of the recommendations was the State Historic Preservation Act of 1982, ARS 41-861 to 41-864. This act put in place at the state level, many of the same procedures of the NHPA and the 1971 Executive Order 11593. This state law directed state agencies to consider the impact of their actions on historic properties and utilize historic properties for state facilities whenever possible. It also strengthened the state tax incentive programs and established the Historical Advisory Commission and the Historic Sites Review Committee.

In the eighties, the National Historic Preservation Act was amended to create the Certified-Local-Government (CLG) program. The CLG program formally involved local governments and citizens in decisions made by other governments that affected the historic properties in their communities. To become certified, a municipality had to have local laws that provided for the designation and protection of historic resources, a citizen Historic Preservation Commission, a program for survey and inventory and public participation in all aspects of its work. Further, 10% of the annual federal funding for each SHPO was required to be "passed-through" to CLG's. Not surprisingly, this funding spurred many local communities to become CLG's. Florence became the state's first, certified in September of 1985. Within a year Prescott, Jerome, Yuma, Globe, Williams, and Kingman followed. Today there are twenty-eight CLG programs in Arizona.

Protection for the State's archaeological resources has always been a key part of Arizona's preservation efforts. As noted, 1927 and 1982 state laws were passed that that mirrored the federal standards and procedures to be used for archaeological resource study and protections. Per the 1982 State HP Act, an Archaeological Advisory Commission was established. This citizen group assists the SHPO in conducting public education about the ethical issues of dealing with cultural traditions, properties, and artifacts, and developing enforcement mechanisms to stem pot-hunting and vandalism of archaeological sites. One of the most important outcomes of this group's efforts was the 1988 creation of the Site Steward program that enlists volunteers statewide to monitor archaeological sites.

Important and far-reaching federal procedures for the appropriate treatment of archaeological resources were created with the 1990 Native American Graves Protection and Repatriation Act (NAGPRA). Public Law No. 101-801, requires all federal agencies and museums receiving federal funding to inventory their collections for human remains and associated funerary objects and notify culturally affiliated tribes to allow reclamation and repatriation. As with earlier federal legislation, Arizona quickly followed with the enactment of the 1990 Burial Protection Act and an amendment to the 1927 Arizona Antiquities Act to address the proper and respectful disposition of human remains. It also created an "Acquisition and Preservation Fund," which uses monies from criminal fines assessed from violations of the law to defray the cost of the removal and repatriation of the remains.

Effective historic preservation programs are clearly tied to having formal protections in place. Historic preservation efforts that are successful, as well as effective, are those that have an array of financial, community, and political support as well. Throughout Arizona's first century these components for success were systematically put in place. First federal, state, and then municipal laws were enacted to recognize selected buildings, areas, and resources as worthy of special protection and treatment, and financial incentives for their preservation were developed early on.

Additional revenue sources were created in selected communities with the passage of bond propositions which provided dedicated monies for such things as the acquisition of threatened buildings and cultural landscapes; emergency stabilization, repair, maintenance or adaptive reuse of historic properties, and the enhancement and interpretation of community landmarks.

Residents of Phoenix passed the city's first historic preservation bond in 1989, allocating $15 million solely for historic preservation purposes. In 1990, voters passed a statewide citizen initiative to create the Arizona Heritage Fund from Arizona Lottery revenues. Up to twenty million dollars of lottery proceeds were approved for annual allocations to Arizona Game and Fish and State Park departments to fund conservation and preservation efforts. For close to two decades, approximately $1.7 million has been distributed annually statewide to support a wide array of community preservation projects. Pima County mounted a campaign for an Open Space and Historic Preservation Bond in 1997. Overwhelmingly approved by the voters, $6.4 million was provided to protect significant archaeological and cultural properties through acquisition, rehabilitation, restoration, or interpretation.

As Arizona moved into the twentieth-first century, the state could boast of having one of the best frameworks in the nation for the advancement of historic preservation in the nation. Almost all its cities and towns had historic preservation programs with ordinances that fairly balanced preservation protections with property rights. Local and state incentive programs generated a desire by property owners for local designation and/or listing buildings and neighborhoods on the NRHP.

Historic neighborhoods prospered, attracting buyers and increasing in value faster than non-designated areas. Preservation crises were few and far between, despite big projects such as the construction of the light rail system in metropolitan Phoenix and the continued increase of the intensity and density of in-fill developments in urban areas. Taking into account historic properties, as part of the planning and development process, had become internalized by the private and public sector and tools were available to make most alternatives that provided for the preservation of cultural resources feasible.

While historic preservations programs enjoyed popularity and few problems in Arizona during the 1990s, this was not the case in many other parts of the country. A growing discontent with government intrusion in people's lives had given rise to a number of nationally funded efforts to limit government powers. Use of eminent domain by government was widely opposed and targeted for repeal through ballot initiatives. Arizona had dealt with this issue in the case of Bailey's Brake Shop and in 2004 the Arizona Court of Appeals had set strict parameters as to when and how eminent domain could be exercised.

Nonetheless, an initiative was placed on the 2005 election ballot, funded by an out-of-state group. This initiative was promoted only as a curb on the use of eminent domain. However, unknown to most, Proposition 207 also contained language that required government to compensate an owner for any governmental action that diminished the value of the property. When Prop 207 was approved by the voters, its consequences went way beyond the use of eminent domain. In Arizona, state law requires that zoning is used to officially designate a property as historic.

After the passage of the proposition, any property owner could petition a government for compensation if they believed the designation had diminished the property's value. While the owner was responsible for proving the diminution had occurred and there is ample statistical data showing that designation of historic homes actually increases their value, most cities put in place procedures that required owners to waive their ability to seek compensation under

Proposition 207 before the City would consider rezoning a property for any purpose. Not surprisingly, asking an owner to waive his or her property rights has severely curtailed interest in being designated as historic. Consequently in the last five years only a handful of properties statewide have been added to local historic registers, even though a growing number of post WWII properties and neighborhoods are becoming eligible for the protection and support to preserve them provided by municipal historic preservation programs.

Perhaps the simplest answer to what has eroded Arizona's support for historic preservation is: the economy. As the city and state revenues have dramatically declined, there have been continual cuts in staffing and programs that support historic preservation at all levels of government. Despite the fact that there is substantial evidence as to the economic benefits of preserving historic buildings and areas, historic preservation has not fared well in competing for the shrinking pool of public funding.[1] Nowhere is this more evident than in the demise of support for the Arizona State Parks system, an important steward and owner of many of the state's most important historic and archaeological resources and the department which houses the SHPO. As detailed in the Morrison Institute for Public Policy's 2009 report, the Arizona Legislature and Governor's Office has steadily eroded support for the state park system by reducing its General Fund appropriations, "sweeping" cash from dedicated Park funds, and requiring the agency to survive on park and user fees.[2] Since its creation, there have been repeated attempts by the State Legislature to "raid" the Arizona Heritage Fund to use the monies for purposes different from which the voters dedicated the fund. These attempts were successfully countered time and again by the citizenry until the 2010 session when the legislators voted to allocate all lottery revenues to the state's General Fund, forcing the shutdown of the Heritage grant program.

During this same session, there was a concerted effort to repeal the state property tax reduction for historic homes. While the repeal failed, it shows a lack of understanding of the significant pay back of the balanced approach to preservation that had developed in Arizona. While some maintain that all government incentive programs should be abolished, this one produced clear benefits. Thus in a few short years, Arizona has gone from actively expanding its recognition and protection of cultural resources in large and small communities statewide and offering a wide array of tools and support for saving, reusing, and enhancing them, to a standstill.

In today's world keeping historic buildings and areas as vital parts of our communities will not just happen by itself. This is particularly true for Arizona as it has relied primarily on new development and growth for its prosperity. For historic preservation efforts to be successful, there needs to be a framework that provides for proactive planning as to what should be preserved. There should be informed decision-making and consensus about what is important and worth saving, and both carrots and sticks used to accomplish preservation goals. The need for a multi-faceted, balanced approach to preserving our cultural resources was realized early on in Arizona and just such a system was put in place at the state and local levels. Now it is being dismantled without an understanding or concern for the consequences which will occur.

Secondly the fragile and tenuous nature of our historic resources must be acknowledged. When historic buildings are lost, they can never be replaced. The fractured, short-term fixes that are being concocted today to address the current economic woes may be suitable solutions for some circumstances. But when historic resources are gone because protection, technical information, or other assistance was not available to help sustain them, they cannot be recovered when revenue streams resume.

In the early sixties, leaders from communities across the nation came together to advocate the development of a national preservation program. In a powerful book which they commissioned, *With Heritage So Rich*, they urged that America should take its place among the great civilizations of the world and become proper stewards for its material culture. They were successful and the National Historic Preservation Act was passed and preservation partnerships, such as that which developed Arizona, flourished. Today Arizona's heritage is genuinely threatened as we discard the practices that have worked successfully for decades. This challenge cannot be met with something as simple as writing a book. But, just as was done then, we must again persuade our citizens and leaders—in a meaningful way—of the imperative for preserving our past. It will be a difficult task, but one we cannot ignore or shirk.

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1 See the website for the Advisory Council on Historic Preservation regarding Web-Available Studies on the Economic Impacts of Historic Preservation: http://www.achp.gov/economicstudies.html.

2 See, Grady Gammage, Jr., and Nancy Welch, *The Price of Stewardship: The Future of Arizona State Parks* (Phoenix: Morrison Institute for Public Policy, Arizona State University, 2009): http://morrisoninstitute.asu.edu/publications-reports/special-reports/2009-201cthe-price-of-stewardship-the-future-of-arizona-state-parks201d.

Chapter 10

Something From Nothing: Artists and the Revitalization of Downtown Phoenix

Greg Esser
Director of Civic Art, Los Angeles County Arts Commission
Founder, Roosevelt Row CDC

Key Points

- Artists are drawn to a "vacuum of affordability" in blighted areas avoided by other developers, businesses, and residents
- Artists can be catalysts for redevelopment
- The revitalization of Roosevelt Row was a creative public/private partnership between the Artists Issues Task Force and the City of Phoenix, which resulted in an Arts, Culture and Small Business Overlay
- Artists represent a significant percentage of property ownership in downtown Phoenix
- Modest investment resulted in a decrease in reported crime rates, new in-fill development, huge growth in the monthly artwalk, new businesses, and increased sales and property tax revenue
- Arts and culture are good economic investments

"Anybody can do something with a million dollars. But it takes someone really special to make something out of nothing."
—Grandma Tressa Prisbrey, creator of Bottle Village in Simi Valley, California

In January 2010, the *New York Times* ran a short profile of downtown Phoenix.[1] The piece did not focus on the voter-approved bond financing that made the downtown Arizona State University campus possible, the $750 million investment in the expansion of the convention center, or the opening of the first twenty-mile segment of the new Valley Metro light rail system, itself a $1.5 billion investment. These are not uncommon infrastructure investments for cities to make under the broad formula of economic development.

The article focused instead on Roosevelt Row, an area of downtown Phoenix defined by a grass-roots, artist-driven economic revitalization that has increased sales tax and property tax revenues and significantly reduced crime, all without a direct expenditure of tax-payer dollars.[2] The arts have played an unquestionably pivotal role in the recent revitalization of downtown Phoenix. In-fill housing, new businesses, national media coverage, enhanced public perception of urban living, and a growing number of visitors and residents have followed. What seemed like an overnight success was more than ten years in the making.

Vacuum of Affordability

What sets artists apart from other professional occupations?

Artists don't typically clock in and clock out, counting down the hours to the end of the work day or the years left until retirement. Rather, they are driven by a deep-seated passion for their creative work and most make great personal sacrifices, working often unrelated jobs to support their professional development and practice as artists. As a group, they are motivated, dedicated, and patient.

Artists, visual artists in particular, need cheap space to create and exhibit their work. Not surprisingly they are drawn to a "vacuum of affordability"—blighted areas that other developers, businesses, and residents choose to avoid. These areas typically have been crime-ridden inner city urban areas, but they also include remote rural areas and small economically struggling towns as well.

Artists have been at the vanguard of re-using discarded materials for new purposes for centuries. They tend to approach problem-solving differently, thinking outside of the box, or ignoring the box altogether. Artists see potential where others do not, and are accustomed to working on nothing more than a shoe-string.

Artists are used to creating something from nothing.

Arts and Economic Development

In 1999, East Roosevelt Street between Third and Seventh Streets was known largely as a place to buy drugs and as a hangout for transvestite prostitutes and their clients. This was the neighborhood where Danny Bonaduce made national news for assaulting a transvestite.

As artists begin to populate derelict neighborhoods like Roosevelt Row in the late nineties, they also begin to attract audiences for their work (Figure 10.1). These audiences, in turn, begin to attract other businesses. Small coffee shops, bars, and restaurants opened. As these businesses grew and drew new audiences, the surrounding neighborhood began to transform.

Figure 10.1
Before and after: Sixth Street Studios was the most blighted property in the neighborhood in 2003 and was converted to affordable artist live/work space.

Photographs by Greg Esser.

The pattern of artists serving as a catalyst for redevelopment and then getting priced out of the areas they contribute to is fairly common. As real estate values begin to increase, artists gradually move on to more affordable areas. In New York, this process of revitalization, or gentrification, unfolded over several decades in SoHo that has now become among the most expensive retail real estate in the world. Artists have also been leaving Williamsburg in New York in favor of more remote and more affordable areas.

Breaking the Rules

Downtown Phoenix provides an unusual case study of this phenomenon fueled by artists. The revitalization of downtown Phoenix has been uncharacteristic for two important reasons:

1. Artists as a group represent over twenty percent of commercial property ownership in the Roosevelt Row district.

2. Revitalization and redevelopment has occurred far more rapidly than in other similar urban environments, in part due to competing priorities for the areas to which artists were attracted, and other significant concurrent public and private investments.

Both of these factors were the result of coincidence rather than foresight and planning. Artists were indirectly encouraged to purchase properties after being displaced as tenants when first the basketball arena and then the baseball stadium were constructed downtown.

Infrastructure improvements were not made in the areas along East Roosevelt because the area was viewed as a future economic redevelopment site, one where existing buildings would be demolished in favor of new higher density construction. The entire area was re-zoned for high-rise development in the 1970s, resulting in a high percentage of single-story building demolitions over time. This has subsequently resulted in a lingering issue of blight caused by entire blocks of vacant undeveloped land.

In spite of other official plans, artists slowly began to purchase and occupy buildings within proximity of one another. They unintentionally began to reshape an entire community. Many of the activities and uses that artists brought to numerous vacant or under-utilized structures in the area were technically, according to the letter of existing laws, ordinances, and regulations, illegal. Rather than simply breaking these various and sundry rules, artists and the City of Phoenix worked collaboratively to write new rules, ones more appropriate to the specific context and desired outcomes.

Whose Bright Idea Was This, Anyway? The Artists Issues Task Force

In September 2005, City Manager Frank Fairbanks charged Phil Jones, Director of the Office of Arts and Culture to convene the Artists Issues Task Force, a new constituent group comprised of downtown stakeholders, primarily in the arts, to develop solutions to the numerous challenges that had emerged as the nascent downtown arts districts evolved. Jones was empowered to include in each discussion appropriate staff from the numerous city departments with jurisdiction or enforcement authority regarding respective issues.

For almost two years, this group met twice monthly to discuss issues and formulate methods of addressing or solving the concerns that the City of Phoenix could support through changes in policies and procedures.

The Artists Issues Task Force, working in tandem with city staff from more than a dozen city departments, developed a tool-kit of policy recommendations. Among others, the policy changes recommended and eventually adopted by the City of Phoenix included:

1. The Arts, Culture and Small Business Overlay

2. The Development Services Department Office of Customer Advocacy

3. Increased flexibility in the interpretation and application of Building Code and Fire Code standards

The common theme among most recommendations was relief from development standards to encourage adaptive re-use of existing vintage and historic buildings rather than encouraging their demolition.

Arts, Culture and Small Business Overlay

The Arts, Culture and Small Business Overlay (ACSBO) is the first more permissive overlay ever adopted by the City of Phoenix. Most overlays, such as those for historic preservation, are more restrictive in terms of allowable uses and building modifications.

The overlay was initially developed by City of Phoenix staff based upon input and recommendations from the Artists Issues Task Force and was later refined through a public hearing process. From recommendation to adoption, this took three years to accomplish.

The overlay adds greater flexibility in terms of allowable uses within its boundaries, and represented the significant recognition that development standards for adaptive re-use in urban areas shouldn't necessarily be the same as those for new construction in suburban areas. The overlay was mapped to capture the emerging arts districts along Roosevelt Street and Grand Avenue.

The overlay is the only area in the City of Phoenix where A-frame signs, or sandwich boards, are allowed. It also reduces the on-site parking requirements when a change of use occurs in an existing building. All the recommendations that were finally adopted in the text of the overlay were developed in response to challenges encountered by the numerous stakeholders represented by the Artists Issues Task Force.

The Arts, Culture and Small Business Overlay was recognized in 2008 with an Award of Merit from the Valley Forward Association for contributing to livable communities.[3]

Development Services Department Office of Customer Advocacy

The development process can be difficult to navigate for seasoned developers and is even more daunting, draconian even, for the newcomer. When artists or other small business owners begin the process of obtaining building permits, the challenges can be confusing and overwhelming to the point of halting a promising new business venture. In order to address the myriad challenges often encountered when non-professionals approach unusual building renovation projects, the Development Services Department established the Office of Customer Advocacy, a new single point of contact for the development process.

While this office has city-wide benefit, it was particularly critical for the urban core where adaptive re-use has become far more common than in-fill and new construction. Many buildings downtown may have had commercial zoning that allowed a range of uses, but only a residential occupancy under the building code. Even explaining the differences between zoning requirements and building occupancy requirements introduced a new measure of customer service for the city.

The Office of Customer Advocacy serves an important role in researching and consolidating the requirements from the numerous different city departments, regulations, ordinances, and codes that might apply to small projects such as converting a residential structure with commercial zoning to a retail garden shop or changing a commercial auto body shop into a photography studio.

Increased Flexibility in Building Code and Fire Code Standards

Without sacrificing public safety, the Development Services and Fire departments both have made efforts to increase the flexibility of building and fire code requirements as they relate to small adaptive re-use projects.

A new definition for “live/work” space was added to the City of Phoenix building code. Previously, these two different uses were not allowed within the same building space under the same building occupancy. An artist was not legally allowed to live in an industrial or commercial space. The option to use the International Existing Building Code, in addition to the International Building Code was also adopted.

Artists created working studio space in a number of small formerly residential buildings. Once or twice per month, these spaces were opened up for the public to enter to view artwork in progress. Artists referred to these spaces as “galleries.” This new use was subject to both zoning and building code requirements. The gallery use was only allowed in commercially-zoned properties prior to adoption of the ACSBO.

An “art gallery” is also defined in the International Building Code as an “assembly” occupancy. Many of the art spaces in downtown Phoenix, under this definition, regardless of square footage, would have been subject to prohibitive higher on-site parking requirements and other standards more appropriate to significantly larger venues. An interpretation was

issued by the Building Official to allow for smaller art venues to be considered the same occupancy as retail stores rather than assembly occupancy based on size, exiting requirements, and other factors.

Under the Bret Tarver Sprinkler Ordinance in Phoenix, any change of use automatically triggers the requirement to install an automatic fire sprinkler system in any building. If a commercial automotive repair shop is converted to a residential or retail use, an automatic fire sprinkler system is required. The Fire Department allowed an exception to this for buildings under 1,500 square feet, an allowance that meant an entire district of small, formerly residential structures occupied by artists could have a change of use without each requiring a new automatic fire sprinkler system.

These interpretations permitted additional flexibility and consideration in the application of building code standards without sacrificing public safety. There was also a clear economic benefit, as they spurred the growth of a flourishing urban district that added new sales tax revenue to the City of Phoenix supporting municipal services including police and fire protection.

These zoning and other policy modifications are "green" in that they allow greater flexibility in the preservation and adaptive re-use of existing buildings. This means less material consumed for new construction and less material diverted to landfills. More importantly, it enhances a distinct urban neighborhood character that builds on an authentic sense of place, one that newer developments often seek to replicate.

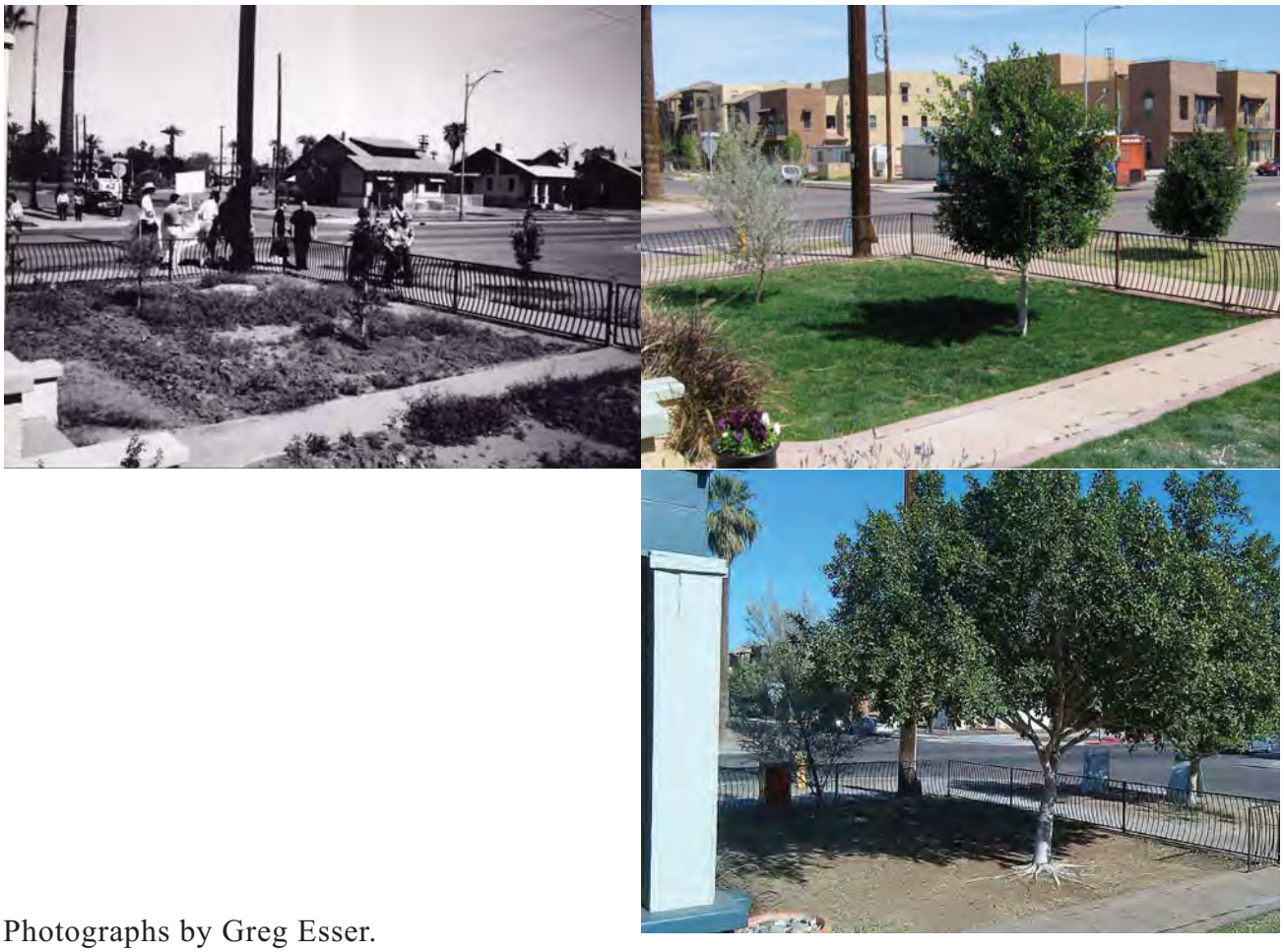
Rate of Return

The policy changes and new programs adopted by the City of Phoenix didn't just allow an emerging artists district to hang on where it might have otherwise been regulated out of existence. Some of the other outcomes of these relatively modest investments in fostering the creative community in downtown Phoenix include:

1. More than a fifty percent decrease in reported crime rates with no direct additional cost for police services between 2000 and 2010. The total actual reduction in criminal activity was even higher since many drugs sales, assaults, and other crimes common in the area were often not reported. More eyes on the street and people walking at all hours discouraged many activities whose perpetrators prefer less public visibility.

2. Attraction of new in-fill development. Artisan Homes, LLC designed a new in-fill housing project on Roosevelt Street to include the first live/work units in Phoenix to mirror the active cultural district in the historic structures on the south side of the street (Figure 10.2). The arts district was also an element of marketing the development that sold out prior to construction with an average waiting list of three people for every available unit.

Figure 10.2
Incremental growth: ficus trees planted in front of MADE art boutique in 2002, 2005 and 2010. Artisan Village, an owner-occupied in-fill housing development was constructed between 2003 and 2005.



Photographs by Greg Esser.

3. Exponential growth in attendance at the free monthly artwalk. Downtown Phoenix has hosted a free monthly artwalk for more than twenty years. In 2000, the event attracted fewer than 100 people to East Roosevelt Street in an entire evening. People were, in fact, afraid to walk around the area after dark. In 2010, the event has grown to become the largest free monthly artwalk of its kind in the United States, attracting as many as 20,000 visitors according to City of Phoenix Police Department estimates.

4. Dozens of new restaurants, bars, retail shops, and other businesses have opened. The decision on the part of business owners to locate in the area was influenced in large part by the audiences drawn by artists for the monthly artwalks.

5. Increased sales tax and property tax revenue. This added revenue supports vital government services that are important to everyone including public safety, libraries, parks, senior services, and after school programs.

6. Increased property values.

Artists foster creativity, diversity, tolerance, and innovation in their communities, all of which are critical to economic competitiveness under Richard Florida's rubric. Artists, drawn to the vacuum of affordability, often play a pivotal role in community revitalization. Some artists don't like to consider themselves part of the machinery of capitalism, but the reality is that arts and culture are tremendously good economic investments.

The City of Phoenix played an important role in fostering the largely grass-roots and sweat equity evolution of the arts community in downtown Phoenix. City leadership could have just as easily enforced existing regulations and eliminated most of the nascent activity that has since garnered positive national media coverage and encouraged greater investment in the area. An open process of on-going community input and dialogue resulted in a number of key policy solutions. A successful public/private partnership created something from nothing. A million dollars, however, could still be put to good use.

Greg Esser is an artist, advocate and arts administrator. Currently he serves as Director of Civic Art for the Los Angeles County Arts Commission. He is the founder and former executive director of the Roosevelt Row Community Development Corporation, a non-profit organization focused on community revitalization through the arts and creating pedestrian-friendly urban neighborhoods. He established several contemporary art venues and businesses in downtown Phoenix including eye lounge, 515, MADE art boutique, and Sixth Street Studios. He previously served as Director of Public Art for the City of Phoenix from 1996 to 2004 and as Director of Public Art for the City and County of Denver from 1991 to 1996. Following these posts, he influenced policy in the public art field nationally as manager of the Public Art Network for Americans for the Arts in Washington, D.C. He received his B.A. with honors from Oberlin College and his M.F.A. with honors from Arizona State University where he also received the Nathan Cummings Foundation Fellowship. His artwork is included in numerous public and private collections.

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1 Michael Tulipan, "Reviving Phoenix Through Art," *New York Times*, 31 January 2010: "Boarded-up buildings and empty lots in the shadow of office towers hardly seemed a promising foundation for an arts district in rapidly growing Phoenix. But once-neglected and dangerous Roosevelt Row, on the north side of downtown, turned out to be an irresistible lure for artists looking for cheap spaces in which to live and work. Galleries, restaurants and a farmers' market soon followed."
See: http://travel.nytimes.com/2010/01/31/travel/31surfacing.html. While this chapter focuses on the model provided by Roosevelt Row, artists have also been key players in the revitalization of Ajo, Bisbee, El Mirage, and Jerome.

2 See: www.rooseveltrow.org

3 Founded in 1969, the Valley Forward Association brings business and civic leaders together to convene thoughtful public dialogue on regional issues and to promote cooperative efforts to improve the environment and livability of Valley communities. Their goal is to make the Phoenix metropolitan region among the best places in America to live, work, learn, and recreate. The group dedicates its resources to enhancing Valley communities. See: http://www.valleyforward.org/

To Preserve, Adapt, Restore, or Build: Arts and Cultural Facilities in Arizona

Shelley Cohn
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Key Points

- Arizona's arts and cultural facilities reflect a community's values and sense of civic pride. Housed in both historic buildings and new architecture, these venues provide opportunities for increased visibility and program advancement for arts and cultural organizations. The very existence of these facilities have become tools for attracting both business and tourism.
- Over the last thirty years Arizona has made a tremendous public and private financial investment in arts and cultural facilities of more than $750 million (not including university and public school facilities); the financial support for ongoing operations for the organizations within these buildings has not kept pace.
- The City of Mesa and the City of Tempe creatively included a plan for sustainability into capital construction costs; City of Phoenix bond-funded projects provided leverage for arts and cultural organizations to raise additional private funds for programs and endowments.
- Many of the facilities funded by voter-approved taxes included provisions for commissioning public art.

Arizonans have a long history of participating in arts and cultural activities; and of investing in facilities to nurture and house them for the benefit of future generations. Facilities investments have been both for new architecturally significant buildings and historically preserved and adapted facilities. The focus of this chapter is limited primarily to those facilities that offer public programs and are owned and operated by non-profit arts and cultural organizations or by city governments, sometimes with a long-term lease to the organizations. The research for this chapter involved collecting information and interviews from about 100 Arizona facilities. It is important to note that this chapter is representative of selected facilities rather than an exhaustive assessment or survey of all arts and cultural facilities in the state (Table 11.1). For instance, Arizona State University (ASU) alone houses eighteen specialized museums. Alternative spaces for presenting arts and culture are also important, but beyond the scope of this chapter.

Over the decades, arts and cultural institutions have dealt with the regular and incremental growth in their annual operations and their abilities to serve greater demands from their audiences. As they grew, they realized the need to develop both visions and plans for new and expanded facilities. The vision and development of arts and cultural facilities has evolved over time to become creative homes for arts and culture, based on the particular and peculiar needs of the specific art forms and the communities in which they are located.

Table 11.1 Arizona Arts and Cultural Facilities

AA Facilities	Location	Adaptive re-use	Historic	New construction	Renovation/ restoration/ expansion	Original construction/ architect/cost	New or renovated Dates finished/ architect
Advocates for Latino Arts and Culture	Phoenix				•		2009
Amerind Foundation	Dragoon		•			1930-1961	2010
Arizona Historical Society comprised of 15 facilities including the largest Arizona History Museum in Tucson and Papago Park Museum in Tempe	Tucson		• Tucson	• Tempe		1954 Tucson	1992 Tempe
Arizona Museum for Youth	Mesa	•			•	1951 Martin Ray Young Jr.	2004 BPLW, 2010 Historic Streetscapes
Arizona Museum of Natural History	Mesa		•			1937 Mesa City Hall with WPA funds Lescher & Mahoney	Expansions in 1983, 1987 and new wing in 2000 Saemisch Di Bella
Arizona Science Center	Phoenix			•	•		1997 Antoine Predock/Conoyer Hedrick
Arizona State Museum	Tucson		•			1893, established by Arizona Territorial Legislature, moved many times	1977 the Museum moved to 1926 UA Library Building
ASU Art Museum/Galvin Theatre	Tempe			•			1989 Antoine Predock
ASU Gammage Auditorum/Kerr Cultural Center	Tempe		•			1964 Frank Lloyd Wright 2.5m; 1959 Kerr Cultural Center	1993-2004 technical upgrades
Bisbee Mining and Historical Museum	Bisbee		•			1897 Copper Queen Consolidated Mining Company (Phelps Dodge Corporation)	1971 became a museum
Carver Museum and Cultural Center	Phoenix	•	•			1926 School	2001 Orcutt Winslow/2006 Michael Baker
Center for Creative Photography	Tucson			•			1989 Burlini Silberschlag
Chandler Center for the Arts	Chandler			•		1989 10.2m SGS Architects	2010 WRL Design
Children's Museum of Phoenix	Phoenix	•	•			1913 School	2008 Fore Dimensions
Cobre Valley Center for the Arts	Globe	•	•			1907 Gila County Courthouse	1984
Coconino Center for the Arts	Flagstaff			•		1980	2000 Josh Barclay
Community Performing Arts Center	Green Valley			•			2008 Antoine Predock
Curley School Artisan Lofts	Ajo	•	•			1919 Spanish Colonial Main Building; 1937 Rancho Style school; 1949 cafeteria	2008
Del E. Webb Center for the Performing Arts	Wickenburg			•			2001 Durrant Architects
Desert Botanical Garden	Phoenix			•		1937	John Douglas and landscape architects
Desert Caballeros Western Museum	Wickenburg	•	•			4 buildings, 1932, 1940, 1960, 1973	Museum rebuilt after a fire in 1973 Hari Van Howefen
Elks Opera House	Prescott		•		•	1905 JR Minor	2010 Otwell and Associates
Fox Tucson Theatre	Tucson		•			1930 art deco movie palace Eugene Durfee	1999-2005 Erickson Leader
Great Arizona Puppet Theatre	Phoenix	•	•			1929 LDS Church Burton	1999 Gerald Doyle
Heard Museum	Phoenix		•	•	•	1929	1983, 1999
Herberger Theater Center, formally Phoenix Performing Arts Center	Phoenix			•	•	1989 Howard, Needles, Tammen and	2010 Gould Evans Bergendoff 4m
Ice House	Phoenix		•			1920	
Mesa Arts Center	Mesa			•			2003 BOORA and DWL
Museum of Contemporary Art	Tucson	•				1970 William Wilde	2009
Museum of Northern Arizona	Flagstaff			•			2009 Robert/Jones Associates
Musical Instrument Museum	Phoenix			•			2010 Richard Varda and RSP
NAU Art Museum	Flagstaff		•			1900 Normal School classrooms, dorms	1991 Orcutt Winslow
Nina Mason Pulliam Rio Salado Audubon Center	Phoenix			•			2009 Weddle Gilmore
Orpheum Theatre	Phoenix		•		•	1927 Lescher & Mahoney 750k	
Patrons of the Arts/Hilltop Gallery	Nogales			•			1972 Edward Starr
Peoria Center for the Performing Arts	Peoria			•			2007 Westlake Reed Leskosky
Phippen Art Museum	Prescott				•	1984	Two-phase expansion with first phase to be completed in 2011
Phoenix Art Museum	Phoenix			•	•	1959-1965 Alden Dow, 1.5m (1m City of Phoenix bonds, 1m construction, 5m endowment)	1994, 2006, 2010 Williams/Tsien; 2000 Vern Swaback .
Phoenix Symphony Hall	Phoenix				•		2005 Westlake
Phoenix Theatre	Phoenix		•		•	1923, Heard family Carriage House/ 1951 Alden Dow 120k	2001-present Substance Design Consortium
Prescott Fine Arts Association	Prescott	•	•			1895 Sacred Heart Church	1969, gallery renovated in 2010
Pueblo Grande	Phoenix			•	•	1974, 750k	1995 CCBG; 2004 CCEG
Queen Creek Performing Arts Center	Queen Creek			•			2003 BPLW
Scottsdale Center for the Performing Arts	Scottsdale				•	1975 Bennie Gonzales, original construction funded by bonds and federal redevelopment funds; galleries added in 1986, 4.9m	2009 John Douglas
Scottsdale Museum of Contemporary Arts	Scottsdale	•				5 discount theaters	2000 Will Bruder
Sedona Arts Center	Sedona	•				1940 peach packing shed/repurposed in 1960 as arts center	1994 Design Group

AA Facilities	Location	Adaptive re-use	Historic	New construction	Renovation/ restoration/ expansion	Original construction/ architect/cost	New or renovated Dates finished/ architect
Sharlot Hall Museum	Prescott					1928 Governors Mansion, Blair, Hatz, Raible	1983
Smoki Museum of American Indian Art and Culture	Prescott					1935 Christopher Totten	no major upgrades; transferred in 2001
Steele Indian School Memorial Hall	Phoenix	•			•	1922 School Auditorium	2008 Swan
Tempe Arts Center	Tempe			•			2005 Barton Myers/Architekton
Temple of Music and Art	Tucson		•		•	1927 Arthur Hawes 200k	1988 Janus & Associates
The Bead Museum	Glendale			•		1986 Prescott	1999 Glendale
The Rialto Theatre	Tucson		•			1920 movie house Curlett & Son	2004
Tubac Center for the Arts	Tubac				•	1972	2009
Tucson Children's Museum	Tucson	•				1901 Carnegie Library	1991 became the Tucson Children's Museum; no major renovations since restored in 1989 to 1938 configuration
Tucson Museum of Art	Tucson			•	•	1975 William Wilde 1.5m	1988 Richard Anderson
Tucson Music Hall and Leo Rich Theatre	Tucson			•		1977	1977, no significant renovation since
UA Centennial Hall	Tucson		•			1936 Roy Place 221k	1985 John L. Mascarella and Associates
UA Poetry Center, Helen S. Schaefer Building	Tucson			•		1960	2007 Line & Space
UA Stevie Eller Dance Theatre	Tucson			•			2003 Gould Evans
Valley Youth Theatre	Phoenix	•	•			1930 Retail Space	1999 CCBG
Yuma Art Center and Historic Theatre	Yuma		•	•	•	1912; 1932 Brooks and Cargill	2004 Van Dijk, Reed, Leskosky

To continue to produce and present the highest quality programs, the organizations needed dramatic improvements in the facilities that housed them. With these new homes there was the expectation for higher quality programs within these new and renovated buildings, and growing operating budgets to realize those expectations. At the same time, cities became more aware of the value of arts and cultural facilities as a symbol of community pride and a tool for economic vitality and an enticement for tourists. New and expanded facilities were expected to attract growing audiences to arts and cultural activities. In recent times the design of these facilities has included gathering spaces and restaurants, making them civic gathering spaces.

The chapter documents the different approaches that have been used for the preservation of historic buildings, adaptive re-use of facilities that had been used for other purposes into arts and cultural facilities, the renovation/restoration of existing arts and cultural facilities and the design/construction of new facilities.

Historic Buildings

At least twenty-four arts and cultural facilities have been placed on the National Register of Historic Places, including:

- Ajo: Curley School Artisan Lofts
- Bisbee: Bisbee Mining & Historical Museum
- Flagstaff: Museum of Northern Arizona, Northern Arizona University (NAU) Art Museum
- Globe: Cobre Valley Center for the Arts
- Phoenix: Carver Museum and Cultural Center, Children’s Museum of Phoenix, Great Arizona Puppet Theater, Orpheum Theatre, Pueblo Grande Ruins, Steele Indian School Memorial Hall

- Prescott: Elks Opera House, Prescott Fine Arts Association, Sharlot Hall Museum Governor's Mansion and Iron Turbine Windmill, Smoki Museum of American Indian Art and Culture
- Scottsdale: Kerr Cultural Center
- Tempe: ASU Gammage Auditorium
- Tucson: Fox Tucson Theatre, Temple of Music and Art, The Rialto Theatre, Tucson Children's Museum, University of Arizona (UA) Centennial Hall
- Wickenburg: Desert Caballeros Western Museum Shride House
- Yuma: Historic Theatre

The restoration and renovation of historic buildings have made effective homes for the arts. The most common former uses of these historic facilities were as schools, churches, movie houses, and homes, notably:

- Schools: NAU Art Museum (1900), Children's Museum of Phoenix (1913), Curley School Artisan Lofts (1919), Steele Indian School Memorial Hall (1922), Carver Museum and Cultural Center (1926)
- Churches: Prescott Fine Arts Association (1895), Great Arizona Puppet Theater (1920)
- Movie Houses: The Rialto Theatre (1920), Fox Tucson Theatre (1930)
- Homes: Heard Museum (1929), Desert Caballeros Western Museum (1932, 1940, 1960), Amerind Foundation (1936), Kerr Cultural Center (1959)
- Other uses: Bisbee Mining & Historical Museum, former headquarters of the Copper Queen Consolidated Mining Company that became Phelps Dodge Corporation (1897), Tucson Children's Museum in the Carnegie Library (1901), Cobre Valley Center for the Arts in the Gila County Courthouse (1907), The Ice House in Phoenix used for exhibitions and performance art is an actual ice facility (1920), Arizona State Museum in the former UA library (1926), Arizona Museum of Natural History from Mesa City Hall (1937).
- Phoenix's Orpheum Theatre (1927), Tucson's Temple of Music and Art, permanent home of the Arizona Theatre Company, (1927), Prescott's Elks Opera House (1905), and Yuma Theatre (1912) were originally designed as venues for the arts.

Adaptive Re-use

Additionally, arts and cultural organizations have been innovative in finding unusual spaces to make over for new uses: Arizona Museum for Youth in a Bashas' grocery store, Tucson Museum of Contemporary Art in an old fire house, Scottsdale Museum of Contemporary Art in a 5-plex discount movie theatre, Sedona Arts Center in a peach-packing shed from 1940, and Valley Youth Theatre in retail space from 1930.

New Construction

Arizona has been fortunate to see a range of architectural designs of both local and nationally-known architects resulting in new facilities construction projects. These include: Arizona Science Center (Antoine Predock), ASU Art Museum/Galvin Theater (Predock),

Green Valley Community Performing Arts Center (Predock), Desert Botanical Garden (John Douglas), Herberger Theater Center (Howard, Needles, Tammen and Bergendoff and Gould Evans), Musical Instrument Museum (Richard Varda and RSP), Nina Mason Pulliam Rio Salado Audubon Center (Weddle Gilmore), Peoria Center for the Performing Arts (Westlake Reed Leskosky), Phoenix Art Museum (Williams/Tsien), Scottsdale Center for the Performing Arts (Bennie Gonzales), Scottsdale Museum of Contemporary Art (Will Bruder), University of Arizona Stevie Eller Dance Theatre (Gould Evans), Tucson Museum of Art (William Wilde), Tucson Music Hall and Leo Rich Theatre, University of Arizona Poetry Center Helen S. Schaefer Building (Line and Space).

Funding Overview: Three Decades

Over the last thirty years there has been a tremendous financial investment in arts and cultural facilities from both public and private funds. It is believed that a 1965 City of Phoenix bond provided $1.5 million for the Phoenix Art Museum building. Since then almost $400 million of public funds have been invested across the state; with the three most recent City of Phoenix bond projects ($186 million), City of Tempe ($70 million), and City of Mesa ($94 million) leading the way with significant contributions. Other cities that have supported facilities with bonds or capital construction funds include Peoria, Ajo, Yuma, and Scottsdale, and the County for Green Valley. School district bonds in Chandler, Wickenburg, and Queen Creek have totaled more than $9 million and leveraged an additional $7 million of private investment. The universities have also invested their funds and raised additional private funds for the creation or renovation of facilities.

From the private sector about $350 million has also been invested. Organizations such as the Phoenix Art Museum, the Arizona Science Center, the Children's Museum of Phoenix, the Elks Opera House in Prescott, and the Mesa Arts Center have leveraged their public contributions with additional private money.

And there have been significant private contributions that have supported arts and cultural facilities without support from the public sector. The leader in private fundraising is the Musical Instrument Museum that raised over $150 million for its facility. This institution alone accounts for about half of the private funds raised for facilities development. Organizations whose capital projects have been supported solely from private sources include the Desert Botanical Garden, the Desert Caballeros Western Museum, the Heard Museum, the Museum of Northern Arizona, the Nina Mason Pulliam Rio Salado Audubon Center, and the Tucson Museum of Art. Other smaller organizations have also exclusively raised private funds for their facilities.

Bond Projects

Public sector initiatives have resulted from communities identifying needs to support arts and cultural programming. These new facilities are a source of pride for their communities.

An early public sector initiative combining city bond funds and federal redevelopment funds was the Scottsdale Center for the Performing Arts that opened in 1975 on the Civic Center

Mall. In 2000 the City of Scottsdale designated the Scottsdale Cultural Council to manage the arts and cultural programs and facilities for the city. Thus, the operations moved from being a city agency to a private non-profit. In 2009 after over 30 years of operation, the performing arts center was upgraded and renovated to keep pace with the new construction projects throughout the valley.

Significantly, in 1988 Phoenix passed one of the largest municipal bonds in the country, voting over $1 billion to enable the creation, expansion, or renovation of many arts and cultural projects including the Arizona Science Center, the Orpheum Theatre, the Phoenix Art Museum, the Phoenix Theatre, the Phoenix Symphony Hall, and the Phoenix Museum of History with $61 million of public funds. A second cultural bond in 2001 in the amount of $66.2 million supported eleven cultural facility projects including the Arizona Science Center, the Carver Museum and Cultural Center, the Children's Museum of Phoenix, the Phoenix Art Museum, the Phoenix Theatre, the Phoenix Symphony Hall, Steele Indian School Memorial Hall, and Valley Youth Theater. The third cultural bond in 2006 in the amount of $58.6 million provided support for eleven projects including the Arizona Opera, the Arizona Science Center, Ballet Arizona, Black Theatre Troupe, the Carver Museum and Cultural Center, the Herberger Theater Center, the Phoenix Art Museum, Phoenix Theatre, and Steele Indian School Memorial Hall. The Orpheum Theatre, Phoenix Symphony Hall, and Steele Indian School Memorial Hall are owned and operated by the City of Phoenix. With one exception all the other facilities supported through the bond program are owned by the city, but operated by independent non-profit organizations responsible for their own annual operating budgets. The Phoenix Art Museum, the Children's Museum of Phoenix, and the Arizona Science Center have been the most pro-active in using bonds as leverage to generate additional private funds to augment bond-funded capital improvements, to grow their endowment, and to support expanded programs and the increasing operational costs of larger facilities.

Other Arizona communities have also become aggressive in their development of arts and cultural facilities and passed bonds to support the capital construction of either renovated or new buildings.

Mesa and Tempe were both visionary and creative in combining a plan for sustainability into the capital construction costs. The projects were grounded in a mission of community building. Operating funds within the tax initiatives have been vital in helping these publicly-financed centers establish a solid foundation for sustainability. The continuation of the sales tax that provided for the construction has been critical to their overall operations. However, those tax funds do not totally support their operations, and they must also generate both earned and contributed income

- Mesa Arts Center was created by a public election that passed a half-cent sales tax in 1998; the project, opened in 2003. One-half of the original sales tax continues in perpetuity to partially underwrite the operations.
- Tempe Center for the Arts resulted from the passage in 2000 of a .1 percent sales tax to design and build the facility. The tax continues until 2020 to support a portion of the annual operations.

Curley School Artisan Lofts in Ajo demonstrates that community activism by the International Sonoran Desert Alliance could protect and preserve the 7.5 acre school and campus. The renovated spaces provide thirty live/work spaces for artists. The renovation cost $1.5 million with most of the funds coming from CDBG and HOME Bonds. The operating costs are paid primarily from the earned revenue from the rental spaces for live/work spaces for artists, which have generally been at close to 100% occupancy.

The Yuma Art Center and Historic Theatre was created and renovated through a City of Yuma bond program; the annual operations are supported by the City of Yuma general fund and/or a voter approved hospitality tax. The Antoine Predock designed Community Performing Arts Center in Green Valley was built with county bonds; however, the organization is now responsible for the annual operating budget. The Peoria Performing Arts Center, the home of Theatre Works (which is responsible for the annual budget), was funded from City of Peoria bonds.

Non-Profit Organizations Within City Facilities

Another model for arts and cultural facilities is cities and municipalities that arrange long-term leases and receive rent from the non-profit organizations who occupy these spaces. The non-profit organizations are responsible for their ongoing operations, but are provided space, generally at lower cost than in a privately-owned building. Funding for facilities improvements has most frequently been raised privately by the organizations. Among those with this kind of arrangement are: Advocates for Latino Arts and Culture (Phoenix), the Coconino Center for the Arts (Flagstaff), the Peoria Center for the Performing Arts where Theatre Works is the twenty-year managing partner, the Bead Museum (Glendale), the Rialto Theatre (Tucson) which has a fifty-year lease with the Rio Nuevo Multipurpose Facilities District, and the Tucson Children's Museum.

- The Museum of Contemporary Art (MOCA) in Tucson was selected in fall 2009 to undertake the renovation of a City of Tucson-owned 1970 architecturally significant and historically important building designed by William Wilde that had been most recently the headquarters of the Tucson Fire Department. In an unbelievable eight and a half weeks, MOCA renovated the 25,000 square feet facility; with private funds of only $115,000. The completion of this project demonstrates how a bold vision with small but significant funding can quickly transform a creative, energetic organization.

Private Sector Initiatives

Many capital projects for arts and cultural facilities have been undertaken totally with private funds, including small grass roots organizations that have developed innovative strategies to finance their facility needs.

- The Musical Instrument Museum (MIM), opened in 2010, is the newest and the largest cultural facility project in Arizona. It demonstrates the will and determination of its founder to undertake this effort with the highest possible quality. The museum has 75,000 square feet of exhibition space and a state of the art performance space with 299 seats.

- The Museum of Northern Arizona recently completed the Easton Collections Center, a state of the art facility for the safe, clean, and environmentally controlled storage of its collections, which also provides access to scholars, tribal constituents, and the public. Tribal representatives participated in the planning of the facility and appreciate the museum's respect and stewardship. It was also recognized by the U.S. Green Building Council with a prestigious Platinum Leadership in Energy and Environmental Award (LEED) for its environmental building standards.
- The Desert Botanical Garden, established in 1937, has undertaken two recent campaigns to upgrade its community buildings, research capabilities, and public garden spaces.
- The Nina Mason Pulliam Rio Salado Audubon Center was also recognized by the U.S. Green Building Council with a Platinum LEED award. The environmentally sensitive building provides an introduction to the wildlife and nature of the Rio Salado riparian area.
- The Amerind Foundation (Dragoon), the Patrons of the Arts/Hilltop Gallery (Nogales), the recent expansion of the Phippen Art Museum (Prescott), the Sedona Arts Center (Sedona), and the Tubac Center for the Arts, are projects, totally funded by local donors. The Ice House (Phoenix) presents exhibitions and performance art, and was purchased, renovated, and financed through a mortgage by the non-profit organization.

Tribal Museums and Cultural Centers

American Indian communities have been active in recent years in creating homes for their collections of artifacts, sacred objects, and art. These centers range from one-room facilities to the recently expanded Navajo Nation Museum of 54,000 square feet of exhibition space. These centers include the Hopi Cultural Center, the White Mountain Apache Cultural Center and Museum, the Salt River Pima Maricopa Museum (Huhugam Ki), the Tohono O'odham Nation Cultural Center and Museum, the Gila River Cultural Center, the San Carlos Apache Cultural Center, the Ak-Chin Him-Dak Eco-Museum, and the Quechan Indian Museum. The Navajo Nation Museum, created in 1961, was expanded in 1998 into a much larger contemporary facility. Arizona tribal cultural centers have also expanded in response to repatriation, whereby they reclaim and preserve their sacred objects and artifacts. Financed primarily through tribal governments, they are responsible for the preservation and presentation of language, archaeological, anthropological, ethnographic, archival, and artistic collections. As a result of gaming and the creation of casinos, some of the tribal communities have created commercial performing arts spaces.

History

The Arizona Historical Society is responsible for overseeing its fifteen properties statewide including the flagship Arizona History Museum in Tucson (88,000 square feet) and the Papago Park Museum in Tempe (82,000 square feet). This institution relies for most of its funds from a direct appropriation from the Arizona State Legislature. The Sharlot Hall Museum, the Prescott Historical Society Museum, is an independent state agency. Mesa and Tempe operate their own historical museums outside of the state system. The Arizona State Museum on the University of Arizona campus (established in 1893 by the Territorial

Legislature, it is the oldest Arizona museum) is part of University of Arizona. The Bisbee Mining & Historical Museum is housed in the former headquarters of the Copper Queen Consolidated Mining Company that became the Phelps Dodge Corporation. Other anthropology and history-oriented museums include the Amerind Foundation (Dragoon), the Pueblo Grande Museum (City of Phoenix), and Arizona Museum of Natural History (City of Mesa).

Partnerships With Public Schools

Chandler, Wickenburg, and Queen Creek have been imaginative in identifying community needs for performing arts facilities and recognizing that neither partner had the financial capacity or usage to undergo and sustain a project on their own. Each project changed to support community priorities.

- The Chandler Center for the Arts/Chandler Unified School District (1989), is funded 50/50 between school and city bonds plus sharing in the operating costs, with program costs funded by contributed and earned income. The building renovation was completed in 2010.
- The construction of the Del E. Webb Center/Wickenburg School District (2001) was funded with school bonds and private funds, with operating costs from contributed and earned income.
- The Queen Creek Performing Arts Center/Queen Creek Unified School District (2003) funded construction by partnering with the city and supporting the annual operating budget after the building was built.

University Projects With Significant Community Impact

- ASU's Gammage Auditorium was designed in 1964 by famed architect Frank Lloyd Wright and remains one of the iconic cultural facilities in the Arizona.
- The ASU Art Museum and Galvin Playhouse, completed in 1989, is a model of an arts campus with the museum and theatre that encouraged collaboration between departments.
- The Stevie Eller Dance Theatre at the UA is a new facility designed specifically for dance. The structure provides a window into the dance rehearsal process so that people passing by are able to look into the glass-walled studios. It has received numerous design awards including three from the American Institute of Architects.
- Center for Creative Photography on the UA campus houses the collections and archives of major national photographers as well as providing exhibitions for the public.
- UA's Centennial Hall, completed in 1937, and renovated in 1985, is listed on the National Register of Historic Buildings. It is managed by UApresents.
- The NAU Art Museum, built in 1900, was placed on the National Register of Historic Buildings in 1986, and was renovated as a museum in 1991.

Public Art

Many of the facilities that were funded by voter-approved taxes included provisions for the commissioning of public art. These projects included

- Three City of Phoenix Bonds
- Special taxes for facilities from Mesa and Tempe
- Capital improvement funds for the Scottsdale Center for the Performing Arts

The public art projects have been both free standing art pieces, as well as works integrated into the design and architecture of the facilities. At the Tempe Arts Center, this included the carpeting design and an indoor/outdoor fireplace. The Mesa Arts Center commissioned artists to design the window treatment for the west side of the building, the floor and skyway glass railings, and a water feature. Although details and descriptions of these projects are beyond the scope of this chapter, they have been well-received both by the organizations using the facilities and the general public.

Future Planning

The strained economy has not kept communities and arts and cultural organizations from continuing to plan for future facilities. The Black Theatre Troupe has recently closed on a building that will be their new home, funded with $2.3 million from the 2006 City of Phoenix Bond and funds from the sale of its previous building. The design and plan for the renovation and expansion of the Phoenix Center for Community Arts is ready to move forward with funding of $8.7 million from the 2001/2006 City of Phoenix Bond. The Winslow Arts Trust/Route 66 Art Museum/Gateway to Roden Crater is a private sector initiative in the planning stages to restore four facilities built in the 1930's in Winslow with about 20,000 square feet of exhibition space to showcase contemporary artists of regional and national standing. Funds will come from the revenue generated from the La Posada Resort and interested nationally recognized artists. On the drawing board in Scottsdale include the private sector initiative of the Museum of the West and the public sector Desert Discovery Center. Other projects are being planned in Ajo, Anthem, and Kingman.

Study Overview

Arizona has a number of large facilities that provide venues for major commercial performers, including the Celebrity Theater (2,650 seats), the Comerica (formerly Dodge) Theatre (1,900-5,000 seats), the Cricket Wireless Pavilion (8,000 seats), Jobing.com Arena in Glendale (20,000 seats), Tim's Toyota Center in Prescott Valley (5,100 seats), the U.S. Airways Center (18,000 seats), and the Wells Fargo Arena at ASU (14,000 seats). On a smaller scale Broadway Palm Dinner Theater in Mesa converted a grocery store in a strip mall.

Arizona is home to many commercial art galleries, and one of the highest concentrations outside of New York or Santa Fe may be found in Scottsdale. The economy has been hard on many of these businesses, and over the last year some have become virtual rather than facility-based galleries. Artist-run galleries on Phoenix's Roosevelt Row and Grand

Avenue have been key components in the revitalization of those neighborhoods, as have artist-developed galleries and spaces in Tucson and Flagstaff.

Schools and school districts have created many outstanding performing arts venues. For the purpose of this chapter only those with a purposeful collaboration with community organizations have been included.

New architecturally significant libraries with performing and visual arts spaces have been built throughout the state; they are many and are beyond the scope of this review. University and community college facilities are included only when they provide significant programs for the public at large, not solely for students.

Organizations whose venues are used primarily for education programs, classes, and rehearsal space are not profiled: the Bisbee Central School Project, Free Arts Arizona (Phoenix), the Phoenix Boys Choir, the Phoenix Conservatory of Music, Rosie's House (Phoenix), the Scottsdale Artists School in the renovated Loloma School, The Drawing Studio (Tucson), and the Tucson Arizona Boys Chorus. Childsplay's Sybil B. Harrington Campus of Imagination and Wonder, a 33,000 square foot former 1970's school was purchased from the City of Tempe for $10 and was renovated with $4.7 million of private resources into a state of the art production and education space. Two projects resulting from the most recent City of Phoenix Bond will provide administrative and education spaces for the Arizona Opera (in the former Circles Record Store on Central) and Ballet Arizona.

Some organizations rent or lease their space for public programs from commercial entities. These include the Patagonia Creative Arts Center (Patagonia), Xico (Chandler), and Young at Art (Phoenix). Using rented facilities for which they have raised significant private funds to turn them into usable theatre spaces are Phoenix's Theatre Artists Studio (96 seats), Tucson's Invisible Theatre (80 seats, has been in a renovated Laundromat for many years), Tucson's Beowulf Alley Theatre (95 seats) and The Rogue Theatre and ZUZI Dance Company (housed at the Historic "Y," which has 100-150 seats). It is significant that small non-profit organizations have been resourceful in turning rental spaces into facilities that serve their needs but have been limited in their capacities to own those very buildings.

The economy has provided some positive opportunities. The West Valley Arts Council has formed a unique partnership with developer DMB to house its offices, gallery, classrooms, and concert series free of charge. The Council also has formed partnerships with commercial developers to use empty retail space as galleries. The ASU Art Museum ("Open for Business") and Scottsdale's public art program ("In Flux" made use of vacant store fronts in the downtown area for temporary installations) have done similar things in their respective cities. The West Valley Arts Council has been operating a gallery in Glendale since 2009, and is in the process of developing similar partnerships with developments in Surprise and Goodyear. There are many more examples of arts groups using alternative spaces to present the arts throughout the state.

Conclusions

The public and private investment of more than $750 million in non-profit or municipal arts and cultural facilities over the last three decades has been substantial. The venues

accommodate audiences ranging from small and intimate to large and expansive. Organizations have been creative in developing additional revenue streams to support the increased operating costs resulting from expanded facilities. Certainly, the cities of Mesa and Tempe realized the need to invest in a funding mechanism to provide for the ongoing operating expenses of their capital investments. The Phoenix Art Museum, the Phoenix Children's Museum, and the Arizona Science Center were pro-active in leveraging city bond funds to raise additional dollars for programs and endowment. Facilities expansions have also included adding gift shops and cafés/restaurants as another source of earned income.

Both the public and private sectors have been forthcoming and generous in providing funds for the creation of new buildings, the renovation of existing buildings, and the adaptation of historic buildings. Often it is stated that Arizona is overbuilt with arts and cultural facilities. However, a study published in 2004 by Maricopa Partnership for Arts and Culture (MPAC) noted that the Valley placed last among benchmark regions in the number of non-profit organizations and last in the number of arts and cultural establishments per 100,000 residents.

Designing, securing funds, and completing facilities projects is only the first step. The biggest challenge for the arts and cultural organizations of all sizes is the ongoing and growing need for annual operating funds to creatively and effectively program and manage the facilities and to make the highest quality programs available to the largest range of the public.

Lastly, in addition to the operational costs needed to fulfill the excitement, promise, and expectation of programs to be delivered in new or renovated spaces, there are also other questions to consider. Are there gaps in the current inventory? Are there certain kinds of spaces, whether large or small, that are not available for some of the arts and cultural resources to program and present their work? Is there a balance between presenting facilities, arts centers, and facilities for local organizations? Have communities with new or renovated facilities been the catalyst for the economic development that was hoped? Are there models that can be replicated or adapted? What are the regional and statewide planning opportunities to consider holistically in the state?

Shelley Cohn retired in October 2005 as the Executive Director of the Arizona Commission on the Arts, having served in that capacity since 1984. She was involved in seeing the appropriation of the Arts Commission grow from 14 cents per capita to 80 cents per capita and in developing special funding initiatives including the Arizona Arts Trust Fund and Arizona ArtShare, the Arizona arts endowment fund. She oversaw the creation of entrepreneurial programs that supported artists and arts organizations to connect with their communities in effective and meaningful ways. After retirement she served one year as the interim CEO of the Scottsdale Cultural Council overseeing the work of the Scottsdale Center for the Performing Arts, Scottsdale Museum of Contemporary Art and the Scottsdale Public Art Program. She has provided consulting work for several state and local arts agencies and teaches an arts and public policy class and arts entrepreneurship class for ASU. She has explored new adventures outside of state government, including the desert landscaping school at the Desert Botanical Garden, the Melton Program for continuing Jewish education, teaching, consulting work, yoga, and bicycling. Ms. Cohn currently serves on the boards of the Arizona Community Foundation, Desert Botanical Garden, Childsplay, Alliance for Audience, and the Bank of Arizona. She holds a masters degree in Humanities from Arizona State University and an undergraduate degree in English from Washington University.

Arizona's Public Libraries: Advancing Culture and Community

Laura Stone
Arizona State Library, Archives and Public Records

Key Points

- Public Libraries are among the oldest cultural institutions in the United States
- Arizona has 215 public libraries and tribal library buildings, housing nearly nine million books
- Libraries are community centers that offer free access to information to people of all economic and social levels
- Libraries enhance communities and contribute to our quality of life
- At the state level, Arizona provides modest direct support for public libraries
- Libraries bolster downtown and suburban cultural and commercial activity by driving foot traffic and enhancing retail and cultural districts
- The current economic climate has challenged libraries to meet growing community needs with fewer resources, fewer staff, and reduced hours

On the Thursday before Halloween, a tiny cowgirl in pink boots peered at books on a low shelf in the children's section of Avondale's Civic Center Library. Her mother knelt beside her, talking with her about the books she had selected. Nearby, a little dragon peeked out from behind the stacks as his mother kept an eye on a stroller holding a smaller sibling in a bumblebee costume. Soon enough, they were joined by superheroes and princesses, all waiting for the library's WiggleWorm Story Time to begin. The Thursday program is designed for 3- to 5-year-olds; younger brothers and sisters can participate in a Toddler Story Time or Books & Babies. By sharing books, puppets, songs, and language play, these programs reinforce early language and literacy skills and gradually help move the children in the audience toward reading.

The little cowgirl and her costumed friends probably didn't realize they were engaging with one of the oldest cultural institutions in the United States. Public libraries, which date back to colonial times, have continually reinvented themselves, reflecting both national and local issues and concerns. "Public libraries have always been about making sure that citizens have the information they need to lead full lives in both the public and private sector," says GladysAnn Wells, Arizona state librarian and director of the Arizona State Library, Archives and Public Records. "How libraries have met those needs has continually changed, but the core mission remains as critical to our nation as ever."

Today's public libraries provide diverse services to meet the needs of their communities. Most libraries:

- Offer free access to information and help in locating information, and serve as repositories and purveyors of language and literature. Arizona's public libraries house almost nine million books, but also offer newspapers, magazines, audio tapes, CDs, and DVDs, as well as access to online subscription research material, digital books, databases, and more.
- Are located in almost every community. Arizona has 215 public and tribal library buildings; there are more than 16,600 across the United States. The buildings often are architectural symbols of community pride.
- Provide free, community-wide programming, including cultural offerings.
- Attendance at library programs in Arizona totalled 1.2 million in 2009.
- Serve as community centers and gathering places for people of all economic and social levels to share resources and ideas. Almost thirty million visits are made to Arizona's public libraries each year, and more than four million Arizonans have a library card.

In Avondale, as at most Arizona libraries, programs are not limited to the pre-school set. The city's two libraries, Civic Center and Sam Garcia, have just under 100,000 fiction and non-fiction books, including special collections of Spanish, teen, and children's materials. The libraries offer computer instruction, host a weekly Needle & Thread Club, and a Master Gardener Class. About 100 people visit the libraries every hour they are open. Earlier in October, the libraries hosted the Avondale Writers Conference, a packed day of workshops, networking, and activities for professional and aspiring writers. Mystery writer J.A. Jance headlined the group of national and regional writers who worked with the local participants. The event proved so popular that registration closed before a planned advertising campaign even started; it drew almost 200 people. "The Avondale Writers Conference was truly a community driven event," writes Ava Gutwein, Avondale Public Library manager. "Local residents responded eagerly to previous writing programs we offered and began asking for more. Their enthusiasm motivated us to pursue opportunities for them to explore the writing marketplace and improve their skills."

About 150 miles west of Avondale, the Yuma County Library District worked for the successful passage of a $53.7 million library bond in 2005 to build four new libraries and remodel the former Main Library. Before the bond vote, a number of focus groups met to discuss the project. Dick Waters, who put together the meetings and presented to the Board of Supervisors, challenged the community to think expansively about the project, asking, "If people have always had hamburger, how will they know to ask for steak?"

Yuma library staff researched and toured numerous libraries before, during, and after selecting VCBO Architecture of Salt Lake City to design the new flagship library and other architectural firms to design the new Foothills, Wellton, and San Luis library buildings, the enlarged Somerton branch, and the renovated Heritage Branch, each reflective of its own community. All of the new facilities are modern, state-of-the-art buildings. The Main Library, which opened in May 2009, is 75,000 square feet with expansive views and natural lighting. Across the entrance to the children's area is a large-scale replica of Yuma's Ocean to Ocean Bridge across the Colorado River. Adult reading areas, computer classrooms, an Arizona

Room, and even a café are other highlights of the new facility. "The passing of the bond election and the resulting new facilities exemplify the importance Yuma County has placed on library services, and those facilities serve to enhance the communities where they reside. The libraries belong to all of us, regardless of age, background, interest level, or subject, and they have the potential to significantly contribute to our quality of life," writes Susan Evans, Yuma County Library District Director.

Newly remodeled, the former Main Library is now the Heritage Library, serving Yuma's downtown neighborhoods. Encased in this 22,000-square-foot building is Yuma's Carnegie Library, which opened in 1921 with 1,053 volumes and seating for twenty patrons. Yuma was the fourth of four libraries that the Carnegie Foundation funded in Arizona. Carnegie libraries had opened in Tucson in 1901, Prescott in 1903, and Phoenix in 1908. Prior to that, Arizona's earliest libraries were collections of reading materials provided by private businesses, often primarily for the use of their employees. Library groups, often with the support of Women's Clubs, had supported the development of libraries in Tucson, Phoenix, and Prescott prior to 1900.

Today, there is a library in almost every incorporated community in Arizona, as well as in many unincorporated communities. Unlike many other states, funding and governance vary for each library in Arizona. Some library systems, such as those in Phoenix, Prescott, and Sierra Vista, are primarily funded and run by their municipalities. Arizona Revised Statutes provides for the creation of a county library system, and 12 of the state's 15 counties have created these secondary tax entities. Some of these counties, such as Apache, Mohave, and Yuma, provide all of the public library service in their counties. Others support direct service in rural or unincorporated areas, such as Cochise and Yavapai counties. Still other counties, such as Gila, Navajo, and Pinal, provide library support services to the libraries in their counties, but do not directly operate public libraries.

At the state level, Arizona provides modest direct support for public libraries. Through the Arizona State Library, Archives and Public Records, the state distributes $650,000 annually, about ten cents per person. The State began funding library extension work in 1957, spurred by the promise of matching federal funds through the federal 1956 Library Services Act. One of the legacies of limited funding and rapid population growth in the state may be that in 2007 Arizona had the smallest per-capita public library square footage of any state, as well as comparatively few library buildings.

Yet, according to a study by the Urban Libraries Council, "public libraries are highly regarded, and are seen as contributing to stability, safety and quality of life in neighborhoods. They are bolstering downtown and suburban cultural and commercial activity." Libraries drive foot traffic, are stable tenants, and enhance retail and cultural districts.

Although the statistics are still being compiled, budget and staffing cuts have been the story across Arizona for the last several years. At the Phoenix Public Library, the largest public library system in Arizona, the budget shrank between fiscal years 2008 and 2010. The number of degreed librarians dropped from 94.3 to 71.7 positions. Overall staffing is down

from 443 full-time equivalents to 330. Over this same period of time, hours have been reduced by a total of nearly 48 percent.

The Phoenix Public Library's mission statement is "We connect today's community to a world of possibilities." They address that mission through their 16 locations and extensive collections designed to meet community needs. Budget cuts mean the library is now focusing almost all its programming on youth and workforce literacy, including ESL, GED, computer classes, and similar programs. According to Phoenix City Librarian Toni Garvey, "Our greatest challenge is to meet growing community needs with fewer and fewer resources. Over the past decade, we have worked to achieve efficiencies that have helped us provide excellent customer service in this more restrictive budget climate."

A 2007 Northern Arizona University Social Research Laboratory, "Survey of Arizonans' Attitudes About Public Libraries," funded by the Arizona State Library, Archives and Public Records, indicated broad support for public libraries. The random telephone survey found that 98 percent of respondents agreed that "public libraries are needed because they provide free information" and that 94 percent agreed that "public libraries are essential for maintaining a productive community." Almost 75 percent of respondents reported visiting a public library in the past year. Despite that broad public support, Arizona's public libraries were funded an average of $30.77 in 2008 for each person in their service area, compared with a national average of $38.62. Andrew Carnegie, whose philanthropy spurred the growth of public libraries at the beginning of the last century, wrote, "I do not think that the community which is not willing to maintain a Library had better possess it. It is only the feeling that the Library belongs to every citizen, richest and poorest alike, that give it a soul."

Although budget cuts have reduced the number of programs at many libraries in the past year, cultural programming has long given soul to libraries. Scottsdale Public Library has offered a rich assortment of programs over the years, and still maintains an art gallery at Civic Center Library. The library gallery has scheduled five exhibits for the upcoming year, including "Focus on Conservation, McDowell Sonoran Conservancy Photography," "Charles Schulz: Peanuts at Bat," and "Zap! Pow! Bam! The Superhero: The Golden Age of Comic Books, 1938-1950." As Kathy Coster, the library's manager of support services, points out, "The Gallery @ the Scottsdale Public Library exemplifies the cultural importance of the public library in the user experience—we are not only about the transformation offered by reading, but also by viewing, hearing, and experiencing many worlds of expression available to us as human beings."

In 2008, Scottsdale Public Library partnered with the Scottsdale Museum of Contemporary Art to design and implement "Picture Books and Museum Looks." Each library branch hosted a series of five storytimes that tied in visual and verbal literacy opportunities. Laminated posters of art work and sixty-two pieces of museum-quality soft sculpture created visual connections to rhymes and songs used in the programs. "This project highlighted benefits of introducing children to the arts at a very young age," writes Marsha Greene, the project director and a Scottsdale librarian. "Many families remarked they felt their preschoolers were too young to bring to an art museum. Thanks to the collaboration between SMoCA and

the Scottsdale Library, we were able to change this perception in a large number of families. Children were able to learn new vocabulary to express art concepts and families were able to connect with community organizations to provide positive outcomes for their children."

Connecting with other community organizations is only one way that libraries help build community. "Libraries are the gathering place where people come to connect, share, and learn," explains Nancy Ledeboer, director of the Pima County Public Library. The Pima County system serves residents from Ajo to Arivaca, and multiple locations in Tucson proper, with twenty-six branch libraries. Ledeboer has many stories about the role of the library as a gathering place "and a place where lifelong learning is front and center." When the Green Valley library was closed for remodeling, the regular patrons found they missed structuring their day or week with a visit to the library, Ledeboer notes. The library is the place they meet friends, find out what is happening in the community, attend programs, socialize, network, and connect with their community. They volunteer, they attend programs, they teach others, they share their stories, and yes—they check out books.

In Arivaca, she adds, people gather inside and outside the library, where there is a Star Night in the parking lot each summer with families bringing food to share while everyone looks at the stars through giant telescopes. "Amateurs of all levels gather to share their love of the stars with children and adults. And a lot of talking, sharing, and community building goes on," Ledeboer explains. The Friends of Arivaca started a "home tour" to raise money for the library. It was so successful that they now "loan" this event to a different organization each year.

In the heart of Tucson, the Martha Cooper Library has become a gathering place for new refugee families who are learning about their new home. The neighborhood association also meets at the library, where it has welcomed these new families into the community. People come to attend literacy classes and to volunteer as tutors—the library helped build community with a Refugee Health Fair, with more than 1,000 people attending the event.

The Bear Canyon and River branches serve very different neighborhoods. "Most people in these neighborhoods have computers and many purchase their own books but they still enjoy coming to the library where their neighborhood associations meet, art classes are taught, book clubs discuss books, and a sense of community is prevalent," Ledeboer says.

While recognizing and celebrating the unique attributes of each of its communities, Pima County also is addressing issues faced by libraries across the country. More people than ever are visiting libraries, many to use the library's computers and free internet. Although large numbers of Americans have internet access in their homes, libraries are helping to bridge the digital divide for those who do not, especially as people who have lost their jobs are finding that the only way to apply for a job or complete a government form is to do so online. Pima County offers free internet computer time at all its libraries, and has dedicated job help at a number of its branches.

Just south of Pima County, Suzanne Haddock coordinates library services for the Nogales-Rochlin Public Library and small branches in Sonoita, Tubac, and Rio Rico. She balances the

needs of the busy border community of Nogales with those of the retirement communities in the northern part of Santa Cruz County. Haddock says that people come to the library knowing they will be taken seriously and get the information they need. As in many libraries, she sees near constant use of the library's public access computers. "Having public computers has changed many lives here including getting employment applications submitted, taking tests for school, emailing friends that are far away, and taking traffic school tests," she says.

At a time when libraries are stressed with budget cuts, greater demands for services, and rapidly changing technology, Haddock makes sure her library is still the heart of the community. "Every day," she says, "we have a group of *viejos* [old gentlemen] who sit at a table and read the papers and then discuss politics. They know they can stay as long as they like and don't have to buy anything. They are pleasant and we welcome their company."

Questions to consider:

- How can public libraries support diverse, free programming when budgets are being cut?
- When considering a library construction bond, Yuma was challenged: "If people have always had hamburger, how will they know to ask for steak?" Is it important for public buildings to inspire us?
- What is the role of libraries in a virtual world?

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The Genius of Parks

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Key Points

- Urban open space has been a strong element in the psyche of American urban dwellers.
- Natural areas provide relief from urban stress, as well as inspiration for creative expression.
- Desert Parks are an integral part of the region's unique urban identity and sense of place.
- South Mountain Park is the largest municipal park in the United States.
- Piestewa Peak is the most popular municipal summit trail in the country.
- Three major threats to the desert parks are decreased funding, encroaching urban development, and open space fragmentation.
- Connectedness is an essential part of preserving an ecological system, and the Metropolitan Phoenix desert parks can become a Turquoise Necklace, linked by a network of linear open spaces.

"The desert should never be reclaimed. They are the breathing-spaces of the west and should be preserved forever."
—John Van Dyke, *The Desert* (1901)

The Genius of the Place

Consult the genius of the place in all;
That tells the waters or to rise, or fall;
Or helps th' ambitious hill the heav'ns to scale,
Or scoops in circling theatres the vale;
Calls in the country, catches opening glades,
Joins willing woods, and varies shades from shades,
Now breaks, or now directs, th' intending lines;
Paints as you plant, and, as you work, designs.
—Fifth stanza, from "Epistles to Several Persons: Epistle IV, To Richard Boyle, Earl of Burlington," by Alexander Pope (1688-1744)

When Pope published these lines in 1731, he was drawing from a legacy of human belief in the spirit of place reaching back thousands of years. Genius derives from the Greek word meaning *to be born*. In Roman mythology this concept evolved into a spirit that guides a person from the moment of birth and helps him or her become the person they are meant to be. Places were also believed to have genius, a natural way of being that needed to be considered when changes were proposed. In light of the origins of the idea of genius, Pope's words give a poetic rephrasing of the obvious: Place matters.

When Pope urged landscape designers in this poem and in his other writings to "consult the genius of place," his interests were mainly aesthetic. His concerns and attentions were embedded in ideas of picturesque theories, notions of beauty, how a place looks, or how it makes one feel while gazing at it. In considering the genius of place within the context of desert open space in Metropolitan Phoenix, the authors argue for a more expansive interpretation of genius, one that acknowledges the deeper physiological connections between people and the natural environment. As David Orr points out in *Ecological Literacy*: "A sense of place requires more direct contact with natural aspects of place, with soils, landscape, and wildlife."[1] Natural places have an intrinsic quality that human beings have the capacity to connect to and by doing so elevate their own spirits, bodies, and minds. Natural places make people feel good. This is their genius.

A Note on Maricopa County

The parks that are the focus of this chapter are located in Maricopa County, and their history is distinct from those in the Tucson area. Though metropolitan Tucson shares similar urban issues, it is outside the scope of this essay. The terrain and proximity to Saguaro National Park has given the metro Tucson area more land that is less vulnerable to urban sprawl. The region has excellent open space access and the Tucson operations budget for parks is twice that of Phoenix. And the city of Tucson has a long history of preserving land. For instance, Tucson Mountain Park (20,000 acres) was established in 1929. It should be noted that Arizona's parks regularly host cultural events and art exhibitions.

Sonoran Desert Parks and the Genius of Place

> "The want of such occasional recreation where men and women are habitually pressed by their business or household cares often results in a class of disorders the characteristic quality of which is mental disability, sometimes taking the severe forms of softening of the brain, paralysis, palsy, monomania, or insanity, but more frequently of mental and nervous excitability, moroseness, melancholy, or irascibility, incapacitating the subject for the proper exercise of the intellectual and moral forces."[2]

Since the early planning phases for New York's Central Park that began in the 1850s, the cultural significance and use of urban open space has been a strong element in the psyche of American urban dwellers. In examining the meaning and use of metropolitan Phoenix's evolution of desert parks, a pattern emerges that differs from that of eastern industrialized cities. This may be seen specifically, in the decision to set aside large tracts of

desert land as preserves, such as South Mountain Park, before the development of more traditional urban recreation-based parks, such as Encanto Park (established 1935). This chapter not only examines the reasons for this pattern of development, but also considers the influence of the desert parks on the sense of place in metropolitan Phoenix.[3]

Although the desert parks of this region provide similar relief from urban stresses as envisioned for Central Park, they also create opportunities that Frederick Law Olmsted saw in the larger, more rugged National Parks. In his report on Yosemite, he noted: "It is a scientific fact that the occasional contemplation of natural scenes of an impressive character, particularly if this contemplation occurs in connection with relief from ordinary cares, change of air and change of habits, is favorable to the health and vigor of men and especially to the health and vigor of their intellect beyond any other conditions which can be offered them, that it not only gives pleasure for the time being but increases the subsequent capacity for happiness and the means of securing happiness."[4] In other words: Natural places make people feel good.

The urban fabric of the Salt River Valley emerged from an existing agricultural landscape, a vast patchwork of orchards and fields stitched together by the complex of irrigation canals. Access to open space was an everyday part of life during the early years of development. Crowded living conditions, coal-burning pollution, and long hours confined within factories that were common in industrialized American cities were not part of the history of urban development in Phoenix. As such, the compelling arguments for providing "lungs for the city," that substantiated the building of Central Park in the 19th century did not exist in this region, not then nor well into the twentieth century. So why did local citizens and municipalities make a concerted effort to preserve large tracts of desert? What was the motivation? And what has been the evolution of desert parks as the urban conditions and structure has shifted to what it is today?

When South Mountain Park, the first of the large desert parks, was established in 1925, the primary incentive was to preserve prime local hunting grounds for the nearby city dwellers of Phoenix. Park advocates wanted a place to get away from the city and hunt. While the hunting interests have long since vanished from the minds of park users, at least with regard to South Mountain, the notion of escape has not.

By the 1960s, when Papago Park was established and other mountain regions within metropolitan Phoenix were being considered for preservation, the Maricopa County Parks and Recreation Department published the *Maricopa County Regional Park System Plan*. This plan established a precedent for considering the outlying urban desert open space as a network. It initially identified four parks to be included within the regional park system: Estrella Mountain (19,840 acres), White Tank Mountain (30,000 acres), McDowell Mountain (20,942), and Lake Pleasant (23,643 acres). In addition, five semi-regional parks—Cave Creek (2,592 acres), Usery Mountain (3,048 acres), Buckeye Hills (3,627 acres), Casey Abbott (which has since been absorbed into Estrella), and Thunderbird (720 acres)—that were more developed and had amenities, such as golf and ball fields, more common to traditional urban parks. A major intent of the plan for the regional parks was to provide nearby desert for escape and isolation from the city. "Regional parks are urgently

needed in our increasingly urbanized, mechanized and over-organized culture to function as a retreat, an escape from the bustle of modern living, a place to 'get away from it all' in the quiet of solitude"[5]

As a similar response to burgeoning urban growth, in the early 1970s, the city of Phoenix published *An Open Space Plan for the Phoenix Mountains*. The document acknowledged the value of escape from urban tensions as a major component and impetus for establishing desert preservation areas within the urban environment: "Here, almost entirely surrounded by mountains and open desert, it is easy to forget one is in a metropolitan area of nearly a million population."[6] This sentiment was echoed in 1998, when the city of Phoenix published the *Sonoran Preserve Master Plan*: "The Phoenix Mountain Preserve is an example of an urban preserve that provides urban dwellers much needed places to recover from mental fatigue associated with increasingly urban lifestyles."[7] With the current population of Metropolitan Phoenix exceeding four million and still growing despite the economic decline, this need for relief is even more vital. The ill effects of urban growth felt in the mid-19th-century are felt even more urgently today, and the concerns voiced in the 1970s *Open Space Plan* still ring true: "Loss of identity and empathy with one's community, infrequent contact with nature, and lack of environmental variety, are contributing to the uneasiness, tension, and violence which is increasingly characteristic of urban life."[8] While desert parks may not have the capacity to cure all urban ills, they can contribute to the healing process and offer preventative relief.

In the past decade, the city of Scottsdale has begun to plan for and acquire land or easements for desert open space in the McDowell Mountains that form an eastern backdrop for the city. In addition, the Maricopa County Parks Department has produced a new master plan for the regional park system. Taken together, all of these desert parks are major components to the sense of place and continue to provide rich and accessible contact with nature. Taken together, the desert parks are an integral part of the region's unique urban identity.

Brief Profiles of the Municipal Desert Parks in Metropolitan Phoenix

> "Strong evidence shows that when people have access to parks, they exercise more. Regular physical activity has been shown to increase health and reduce the risk of a wide range of diseases, including heart disease, hypertension, colon cancer, and diabetes. Physical activity also relieves symptoms of depression and anxiety, improves mood, and enhances psychological well-being. Beyond the benefits of exercise, a growing body of research shows that contact with the natural world improves physical and psychological health."[9]

This section provides some factual information for each of the major municipal desert parks. They are listed by date of establishment, beginning with the earliest park. Because of the scale of the regional park system, with ten parks and over 120,000 acres, and the brevity of this paper, the county parks are not included in the profiles. Resources noted at the end provide detailed information for all the parks.

South Mountain

Date Established: 1925
Location: The long narrow mountain spans just west of the I-10 to 51st Avenue and separates South Phoenix from Ahwatukee.
Acres: 16,000
Highest Elevation: 2,690 feet at Mount Suppoa

Significant Features:

- Largest municipal park in the country[10]
- 3 million visitors each year
- 51 miles of trails
- Many structures built by 4,000 Civilian Conservation Corps workers from 1933-1940
- Environmental Education Center (which was closed for budgetary reasons on April 5, 2010)

Papago Park and Adjacent Tempe Parks

The most urbanized of the desert parks, Papago Park includes more developed amenities, such as golf courses and baseball training facilities. However, the unusual geological features and preserved and restored desert landscape aligns it more with the larger desert parks than the traditional urban parks with regard to the concept of genius of place.

Date Established: 1964
Location: In Tempe and Phoenix, the park complex includes Phoenix's Papago Park and Tempe's Moeur Park. The desert land is roughly bounded by 52nd Street to the west, Oak Street to the north, the Cross-Cut Canal and College Avenue to the east, and Van Buren, Mill Avenue and the 202 on the south.
Acres: 1,200 for Papago Park and an additional 346 acres for the Tempe parks
Highest Elevation: 1,700 feet

Significant Features

- Hole-in-the-Rock
- Big Butte
- Phoenix Zoo
- Desert Botanical Garden
- 2 municipal golf courses
- Cross-Cut Canal

Camelback

Camelback serves as an example of strong citizen involvement in open space preservation. The park land was purchased in part with funds raised by school children during the Save Camelback Foundation campaign in the 1960s under the leadership of Lady Bird Johnson and Barry Goldwater.

Date Established: Late 1960s with enlargement in 1971 and 1980s
Location: Camelback Mountain separates Scottsdale from the Arcadia District of Phoenix, running east-west from 4th street almost to 44th Street.
Acres: 426
Highest Elevation: 2,704 feet

Significant Features:

- Echo Canyon
- The Monk, the unusual rock formation that sits atop the camel's nose
- Challenging hiking trails
- Picturesque topography

Phoenix Mountain Preserves

The fifth largest municipal park in the country, the Mountain Preserves include significant ranges in North Phoenix with Piestewa Peak, Shaw Butte, and North Mountain.[11] The mountain preserves include the North Mountain Preserve, Lookout Mountain Preserve, and the Phoenix Mountain Preserves, though from an ecological perspective they need to be considered as one large patch within the urban network. The easiest way to comprehend the mountains within the Preserves as a contiguous range is to look at an aerial view. Like a giant swimming through an ocean, the mountains reach up from the surface of grey urban development, an arm made by Camelback stroking south toward the Papagos.

Date Established: 1972
Location: Bounded north and south by Greenway and Lincoln, the mountains span north-west to south-east from 19th Avenue to Tatum.
Acres: 7,500
Highest Elevation: 2,608 at Piestewa Peak

Significant Features:

- Piestewa Peak (formerly known as Squaw Peak), with over 500,000 hikers each year is the most popular summit trail in the country"[12] and provides a challenging climb and beautiful vistas.
- Dreamy Draw Recreation Area

Phoenix Sonoran Preserve

The Sonoran Preserve is a significant departure from the historical practice of preserving desert mountains, most of which are contained within the Palo Verde biotic community. The Sonoran Preserve plan adopted a more ecological approach to determining land preservation so that a complete mosaic of local biotic communities is included within the preserve. Similar to the concept applied in developing the Emerald Necklace in Boston, the plan links existing open space within the city. The preserve is still under development and to-date 6,680 acres have been acquired within the preserve.

Date Established: 1998
Location: Predominately in North Phoenix between 67th Avenue and Cave Creek Road above the CAP canal and as far north as New River. Additional areas adjacent to South Mountain have also been acquired as recommended in the *Sonoran Preserve Master Plan*.
Acres: 25,000 planned, 6,680 acquired to-date
Highest Elevation: 2,269 feet at Pyramid Peak

Significant Features

- Cave Creek, Apache, and Skunk Creek washes
- Pyramid Peak
- Union Hills
- Links to Cave Buttes Recreation Area, Deem Hills, and Reach 11 Recreation Area

McDowell Sonoran Preserve

In 1990, citizens of the city of Scottsdale developed a study boundary of 36,400 acres within which a desert preserve would be established. In the twenty years since this initial effort, the city has adopted an ordinance establishing the preserve and citizens have repeatedly voted to raise acquisition funds through taxation. While much of the land still remains within the State Trust system, much of it has been reclassified for conservation. The city recently expanded acquisition by 2,000 acres. It is currently, reported at 11,250 acres, ranked as the third largest municipal park in the nation.[13]

Date Established: 2000
Location: McDowell Mountains adjacent to the city of Scottsdale
Acres: 36,400 acre study boundary within which 14,000 acres are actively being acquired for the preserve
Highest Elevation: 3,852 feet

Significant Features

- Lost Dog Wash Trailhead
- McDowell Mountain Range
- Adjacent to McDowell Mountain Regional Park, part of the Maricopa County parks system
- Potential for connection to Tonto National Forest

Threats to the Genius of the Desert Parks

> "Very often the intangible values of beauty, refreshment, awareness of the past, and the opportunity to enjoy nature yield to the formidable economic pressures for profitable development."[14]

Despite the inherent value of the desert parks, there are a number of factors that threaten their integrity and quality. Currently, three major threats to the parks are: decreased funding, encroaching development, and open space fragmentation. The newer desert preserves are still in the acquisition phase of development, so for these parks to be fully realized, funding support needs to continue. Development and management for all the parks is also a

pressing concern. The current economic decline has already begun to impact parks in the region, and across the state and nation. The interpretive center in South Mountain closed indefinitely this year, due to budget cuts. Park hours have decreased. Municipalities are considering charging additional fees for entry, a cost beyond what tax-payers have already given to acquire, develop, and maintain the parks to date. While doing more with less is a tenet of sustainability, so is the old maxim that an ounce of prevention is worth a pound of cure. Sustaining the support of existing desert lands is far more economically sound than paying to try to recreate later what has been lost from decreased management and development now.

Since the mid-20th century, urban development in the Sonoran Desert has continued to erode the desert park system's ability to offer opportunities for escape. Natural areas provide relief from urban stress, but they can also offer inspiration for creative expression. Artists throughout the centuries have, like Pope, "looked to the genius of the place" as subject and muse. When John Van Dyke, an art history professor and critic roamed the Southwest while writing his 1901 book *The Desert*, he recognized the beauty of the natural desert landscape. Speaking in the language of the Picturesque, he recognized the beauty in the desert's inherent vastness: "Is it not true that bulk and breadth are primary and essential qualities of the sublime in landscape? And is it not the sublime that we feel in immensity and mystery? If so, perhaps we have a partial explanation of our love for sky and sea and desert waste. They are the great elements. We do not see, we hardly know their boundaries are limited; we only feel their immensity, their mystery, and their beauty."[15]

But a desert vista can only provide artistic inspiration and mental relief, if one can see it. A tract of desert landscape can only provide escape if the visitor feels separated—physically or psychologically—from whatever he or she is trying to escape. Encroaching urban development threatens both the visual and the physical access to the desert parks system. It has also created fragmentation, particularly with respect to the older mountain parks which began on the outskirts of the city but over time have become enveloped in the growing metropolis of Phoenix. All of the county regional parks, South Mountain Park, Camelback, and the Phoenix Mountains were established when they still abutted non-urban development. These large tracts of desert could still function as an ecological network, because they remained linked to undeveloped land. The distinct municipalities were separated from one another by farmland or natural desert. These cities have long since connected into a contiguous ocean of urban and suburban sprawl, leaving the preserved mountains to peak out like an island archipelago.

The more recent Sonoran Preserves in Phoenix and Scottsdale are a response to this trend of fragmentation. These efforts have taken a more ecological approach to determining open space form, boundaries, and distribution. Connectedness is an essential part of preserving an ecological system. The precedent method of saving isolated mountains has created a challenge in this regard. When Olmsted developed the master plan for the Emerald Necklace in Boston (1878-1896), he recognized the existing large open space, but the greatest contribution of the plan was in seeing these fragments as jewels strung along a system of linear parks. The large desert parks have the potential to be seen as Olmsted saw the Back Bay Fens or Jamaica Pond. Taken together, the desert parks of Metropolitan Phoenix can become a Turquoise

Necklace in which the gems are linked by a network of linear open spaces—such as the Salt River, the Canals, and washes that still are part of the valley's urban fabric.

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Papago Salado Association:
The Papago Salado Region is a desert island in the heart of the Valley's metropolitan area where the cities of Phoenix, Scottsdale, and Tempe, Arizona meet.
http://www.papagosalado.org/

Online Sources for Desert Parks in Metropolitan Phoenix:

Phoenix Parks and Recreation Department:
http://phoenix.gov/recreation/rec/parks/preserves/index.html

Scottsdale McDowell Sonoran Preserve:
http://www.scottsdaleaz.gov/preserve.asp

Maricopa County Regional Parks:
http://www.maricopa.gov/parks/

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[3] These Tucson and the other mountain parks of the region are included in the *Sonoran Desert Conservation Plan*. Also, while this essay is focused on urban desert parks, the authors want to acknowledge the current concerns regarding the Arizona State Park system, and recommend the Morrison Institute document regarding this issue: Grady Gammage, Jr., and Nancy Welch, *The Price of Stewardship: The Future of Arizona State Parks* (Phoenix: Morrison Institute for Public Policy, Arizona State University, 2009).

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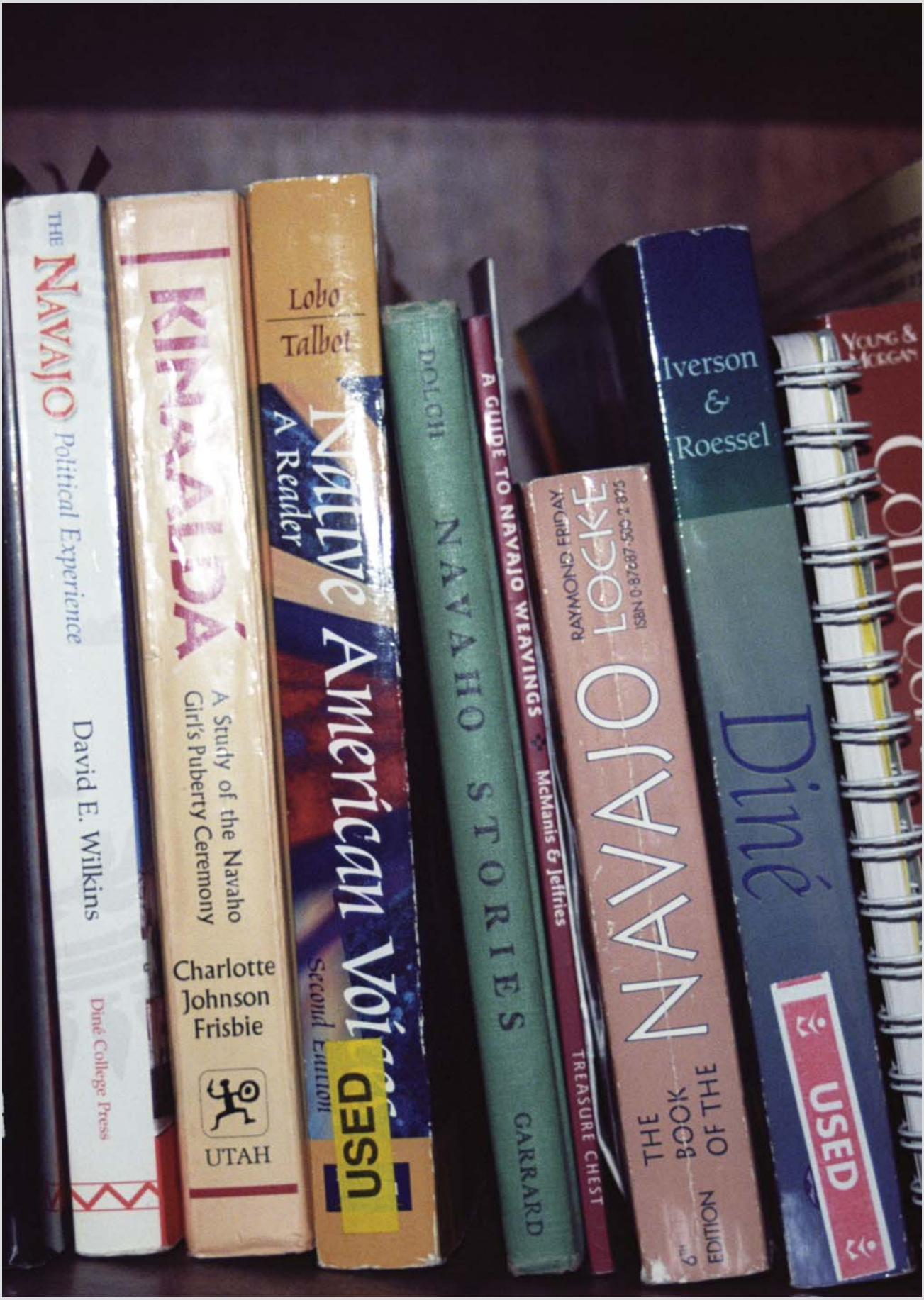
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The State of the Arts in Native Arizona: Arts, Culture, and the Economy

Wendy Weston
Director of Special Projects, Heard Museum

Key Points

- There are 22 federally recognized American Indian tribes in Arizona, 16 of which have a museum or cultural center
- The 2000 census reported more than 250,000 American Indian residents in the state, 95,000 of whom live off reservation, including 50,000 in Maricopa County
- American Indian land holdings comprise more than a quarter of state lands
- Art and culture are the foundation of community self-definition and self-determination for Native people
- Artists play an important role in reservation economies
- Limited information exists regarding the impact of Native art businesses on state and local economies

Introduction

Arizona is home to twenty-two federally recognized American Indian tribes, with as many separate reservations. The 2000 census reports that more than 250,000 American Indians reside in our state. American Indian land holdings comprise over a quarter of Arizona's lands. Each tribal community has a distinct language, governmental structure, social and cultural organization.

Of significance and unlike many other tribal communities throughout the country, tribal languages are still spoken on an everyday casual basis in many of Arizona's American Indian communities. Art and the concept of art is one that is interwoven into everyday life. In many Native languages, there is no one word that is a literal translation for art. Instead, using the arts as a means of passing tradition through stories, songs, dance, and the creation of material objects is still widely practiced.

Sixteen of the twenty-two tribal communities have a museum and/or a cultural center, many of which receive funding through tribal allocations. However, such assistance is minimal as tribal communities struggle to serve their constituencies in the areas of health, education, and social services.

Native Inclusion in Arts Programs in Arizona

There has long been a disconnect between native communities and many of the art support organizations across the state. This is not a new issue and is compounded by complications relating to both culture and communication.

Currently there are no Native artists on the official Artist Roster maintained by the Arizona Commission on the Arts (ACA), a valuable resource for presenting organizations and schools. Another ACA funding category is the Artist Project category. In 2009, only one Native artist received an Artist Project grant. Grants provided have a direct relationship to grant applications. The Arts Commission continues to work with native leaders on and off of tribal land to grow participation in their grant programs. Most recently Arts Commission staff conducted a workshop on the Navajo nation about new opportunities for product sales.

In FY 2010 the Hopi Cultural Center and Museum, the Quechan Tribal Museum, the San Carlos Apache Cultural Center and Museum, and the White Mountain Apache Tribal Museum received general operating support from the Arizona Commission on the Arts. In FY 2011, only the Quechan Tribal Museum and the White Mountain Apache Tribal Museum received general operating support. The challenge in working with tribal museums is often the tribal leadership does not support the application and in some cases has attempted to divert funding to other tribal needs beyond the arts.

Since 1973, eight Native people have served as Commissioners for the Arizona Commission on the Arts, but there has not been a Native Commissioner since 2006. These individuals are appointed by the Governor and serve non-salaried 3-year terms.

The Tucson Pima Arts Council (TPAC) serves the arts community in the southern part of the state. While there are no Natives that serve on the Board or staff, a partnership with the First Peoples Fund, a national organization that supports the advancement of American Indian arts through grants, fellowships, and professional development has partnered with TPAC to present the Native American Artists Professional Development Workshops. Designed specifically with Native artists in mind, these uniquely tailored workshops will be conducted in January, 2011. Native artists who are residents of Arizona will be able to receive the tools and support they need to manage a small entrepreneurial business and tips on how to realize economic success. The goal is to enable Native artists to make a living from their art through sales, thus allowing them to sustain themselves, their families, and their communities.

The Community Foundation for Southern Arizona helps to connect individuals with causes they wish to support to make a positive impact in their community, but at present, only one Native person sits on the CFSA board.

There are several arts organizations in Coconino County that serve the arts community. Currently, there are no Native people who occupy a seat on any of the boards. Yuma County does not have Natives on any of their arts commissions either.

The Arizona Humanities Council (AHC), based in Phoenix is not a state agency but the Arizona affiliate of the National Endowment for the Humanities. It developed and is guided where pertinent, by an initiative that recognizes American Indian elders and traditional teachers as scholars when involved in projects that are focused on their particular culture. The organization's database of 234 humanities scholars includes nine American Indians, and one Native person serves on the AHC Board of Directors.

One of the current initiatives at the AHC is Project Civil Discourse, where lectures and community discussions serve to create a respectful and proactive dialogue on issues such as education, healthcare, race, immigration, religion, and transportation. At present, there are no Native organizations participating in the program and, as a result, a mechanism whereby a Native perspective might be shared has not been included.

According to the 2000 Census, 95,000 American Indians live off of the reservations. It is estimated that over 50,000 Natives live in Maricopa County and the Phoenix metro area. The City of Phoenix's Office of Arts and Culture works to advance the growth and development of the arts and culture community. It currently has no Native people on its staff, serving as a commissioner, or on any of their committees. Occasionally, Native people serve on grants review panels.

Strengths

For Native people, art and culture are the foundation of a collective self-definition and self-determination. Native artists are not only individuals who are expressing themselves in their space and time, but also members of a cohesive community who acknowledge their responsibility as carriers of cultural knowledge. Artists play an important role in local reservation economies, attracting tourist dollars and visitors from all over the world. They also play an essential role in the non-Native art world, participate in the production of every art form, and work in every facet of the arts industry in our state.

The languages spoken in our communities, the songs and rituals that still take place, are all a form of art, art that artists and cultural workers are striving to preserve through innovative programs and educational projects. Native arts are integral to indigenous culture and life as well as to identity and community. There is a deep connection to art and culture, but that does not mean that only traditional arts are authentic or hold more significant meaning in tribal communities. Contemporary paintings, sculpture, and ceramics, things one might see in an art museum, are just as vital to the Native art scene as our traditional crafts.

When speaking with Native people from all over the state, three common threads always emerge: land, language and family. To this end, Native communities rely on this sense of belonging to help guide their citizens in their artistic endeavors, thus improving the quality of life in their community.

The Arizona Office of Tourism places significant importance and value on the unique arts and cultural experiences available to visitors through interactions in our tribal communities and with Native people. Tribal tourism is a significant contributor to our state's economy as observed through visits to reservations and attendance at the more than fifty American Indian art shows, tribal fairs, and cultural gatherings.

Challenges

The economic conditions of Arizona's tribal communities are such that many people are unemployed and do odd jobs or curio type art work to support their families. Indian communities lack adequate infrastructure to support small business operations and all that it entails. These small cottage industries are a day to day operation with the proceeds from the previous day's sales going to fund basic needs such as food, gasoline for travel to sell their wares, and to purchase additional raw materials in order to maintain a competitive inventory.

Given the fact that there are large urban American Indian populations in our state, many Native artists endeavor to work in a genre that is outside of the stereotypical paradigm. In choosing this career path, they find it difficult at times to maintain a true and constant connection to their grassroots communities.

No arts service organization dedicated to promoting Native arts or artists exists in Arizona. In the past, Atlatl, Inc., provided technical assistance to Native artists, advocated for their inclusion in mainstream art projects, and convened local and national conferences that produced written materials on issues that would serve to move critical thought on Native art forward. Sadly Atlatl, Inc., closed due to mismanagement and lack of funds.

Currently there is no targeted mechanism in place in the state to inform Native artists of opportunities to apply for fellowships, grants, and awards. As a result, in many of the long lists of awardees, the names and work of Native artists are not present. Geographical distance from urban centers and unreliable internet service has made it more challenging make Native artists aware of opportunities to apply for fellowships, grants, and awards, and to urge them to apply. This is one of the contributing factors for the dearth of Native artists on the lists of awardees. Efforts have been made to change this. The Arizona Commission on the Arts works to inform native artists of opportunities through the commission, the Department of Tourism has a native staff member who works to connect with tribal nations, and the Berlin Gallery at the Heard Museum is an innovative sales program focused on contemporary native art.

There is very limited statistical information on how individual Native art businesses perform or how they impact and interface with the state and local economies. Such a lack of accurate data makes it difficult for non-tribal organizations, municipalities, and institutions to become educated about this topic. Lacking reliable statistical resources has presented challenges in the promotion of Native arts and culture.

Opportunities

Several venues host large annual American Indian art shows that not only produce revenue for the state and local economies, but for Native artists as well.

The Heard Museum in Phoenix has the largest Indian Fair and market in the state. Held the first weekend of March for the past fifty-two years, this internationally acclaimed event showcases the finest works of over 600 American Indian artists from all over the country, including Arizona.

Since 1976, the Pueblo Grande Museum in Phoenix has presented an annual art market on the second weekend of December. More than 150 Native artists typically show their work. The West Valley Arts Council sponsors an American Indian Market, and Litchfield Park also hosts a Native American arts festival.

The annual Southwest Indian Art Fair is presented each February at the Arizona State Museum on the campus of the University of Arizona. Over 200 Native artists show and sell their creations.

The Museum of Northern Arizona sponsors festivals during the summer months that celebrate the Hopi, Navajo, and Zuni cultures. A highlight of the program is that it offers both traditional and modern cultural presentations and visual arts. The West Valley Arts Council sponsors an American Indian Market, and Litchfield Park also hosts a Native American arts festival.

In the White Mountains, the Pinetop-Lakeside community sponsors a Native art festival at the White Mountain Apache's Hon Dah Casino each June. Over fifty Native artists share their art and culture with the public.

Smaller museums that present exhibits dealing with Native art and culture are the Amerind Foundation in Dragoon, the Phippen Museum in Prescott, the Smoki Museum in Prescott, and the Mesa Arts Center. Several of the casinos feature extensive art displays and casino revenues have funded new art centers on some reservations.

Funding Issues

In these tight economic times, it is always a challenge to secure funding for small non-profits, art spaces, and cultural organizations. For American Indian communities, it remains an additional challenge to identify individuals from within a tribal community or organizations who have the adequate skill set and expertise to secure any funding that may be available. This observation is reflected in the small number of grants that are awarded to Native organizations or tribal communities as described above. In addition, tribal leadership has to be in support of applications to funders related to arts and culture grants.

For the individual American Indian artist who is operating a small cottage industry from the reservation, it is difficult to obtain enough extra cash to secure a space at an art show in one of Arizona's metropolitan areas, in addition to the travel expenses they incur.

In many of the rural reservation communities, internet service is not readily available, thus creating another hurdle for an artist who is seeking to submit proposals and applications online.

Role of Arts in Economic Development

The Intertribal Council of Arizona has a Cultural Resources Working Group within the structure of the Policy Development component of their Working Groups and Advisory Councils. This is a forum for tribes to share information and new initiatives, addressing areas

of common concern and providing input on policy decisions made by state and federal agencies. This is the closest a large tribal lobbying organization comes to including the arts in their agenda.

Native Americans for Community Action in Flagstaff, administers the Oak Creek Vista Overlook Program. Developed in partnership with the United States Forest Service, Coconino National Forest, in 1988 as an economic development project, it enables Native artisans to sell their arts, crafts, and jewelry at the prime tourist locations in the Oak Creek Canyon area. The program has grown in popularity and in reputation each year. To date, 280 vendors have registered to sell their work, and for many, the money they earn through the Overlook Program is their major source of income.

In the Navajo Nation, the Navajo Arts and Crafts Enterprise is a large non-profit that is owned and operated by the Navajo Nation. In addition to the main site in Window Rock, there are five satellite sites throughout the Nation. The enterprise seeks to provide Navajo vendors with raw materials to purchase in order to create their art work. In turn the enterprise then purchases the merchandise wholesale for sale to the public. Many locations on the Navajo Nation are tourist destinations and the sales of Navajo arts and crafts remain steady during the summer months when tourist visitation is at a high level.

Established in 1996, Tohono O'odham Community Action (TOCA) is a community based non-profit organization dedicated to creating and sustaining a culturally vital community within a tribal Nation. TOCA incorporates food systems and wellness, basketry, intergenerational programs, and arts and culture revitalization to realize a successful model of engaging community through an integrated approach to the arts. They currently operate a gallery stocked with art created by local artisans and the Desert Rain Café in Sells that serves traditional foods harvested from their community gardens.

Conclusion

The twenty-two tribal communities in Arizona are vibrant and steeped in tradition, while advancing in today's world. By strengthening partnerships with tribal communities, the Arizona Office of Tourism has a marketable product to sell to the local and international traveler. Tribal communities are still considered separate political, social, economic, and cultural entities by a majority of Arizona's arts stakeholders, a situation that is mostly due to lack of adequate education and training regarding the state's tribal communities.

The arts in Native Arizona are thriving, and their success is due to the creativity and tenacity of the artists themselves and to the work of cultural advocates and leaders of Native arts and culture organizations. But, there are too few such leaders, and the demands placed on them are many.

Continued growth and vitality in the Native arts sector requires renewing and re-energizing current leaders as well as recruiting and developing new ones.

Several key questions emerge:

- As workers in the field, we must ask ourselves, how can we further the development of key leadership roles in Native arts in the state?
- What motivates businesses in our state to promote the work of Native artists and encourage the practice of Native arts?
- What institutions and organizations are available for doing this work?

Wendy Weston was born and reared in the Four Corners area of the Navajo Nation in the community of T'iisNaasbaas. She has devoted her career to advocating for Native artists and having the Native voice represented in public arts and culture programs. She is a strong supporter of and advocate for Native artistic expression, be it in traditional form or a progressive cutting edge genre. Her work with cultural and arts programming has increased awareness of and respect for Native arts throughout the world. Currently, Weston serves as Director of Special Projects at the Heard Museum in Phoenix. Prior to joining the staff in 1996, she served as Program Coordinator for Atlatl, Inc., a national service organization for Native arts, and spent several years as a Roster Artist for the Arizona Commission on the Arts. She holds a Bachelor of Science degree in Political Science from Arizona State University and has completed graduate coursework in Museum Studies and Cultural Anthropology.

Four Centuries and Counting: Contemporary Latino/a Arts in Arizona

Ann Seiferle-Valencia
Curator of Latin American Art, Tucson Museum of Art

Key Points

- Latino/a arts have a rich, well-established history within the state of Arizona, extending back to the 16th and 17th centuries
- Latino/as represent a growing demographic in Arizona
- Latino/as remain an untapped resource for support and patronage of the arts
- Arts education can make a unique and positive impact in the educational success of young Latino/a students
- SB 1070, signed into law in 2010, has had a significant economic impact on Arizona's Latino/a art community

Introduction

A number of terms exist by which Latino/a people refer to themselves. Terms such as Latino/a, Chicano/a, Hispanic, Mexican, and Mexican-American have meanings that often overlap. Many of these terms have additional connotations, some emphasizing national identities (Mexican, Mexican-American) while others identify cultural or social identifications (Latino/a, Chicano). Others are primarily demographic terms (Hispanic or Latino/a). Some individuals or communities prefer to identify themselves with the state or countries they or their ancestors originated in. The overlap in these terms demonstrates how definitions of ethnicity change over time. It is difficult to identify one single term that all people of Mexican, Mexican-American, or other Latino/a descent would be comfortable using. The generalized term used in this chapter is Latino/a, an umbrella term under which more specific forms of identity are included.[1]

This chapter considers the strengths and challenges Latino/a artists face in working in both traditional and modern media, drawing on a culturally rich heritage and using a striking range of artistic styles. Several themes are highlighted:

- History: Latino/a arts have a rich, well-established history within the state of Arizona, extending back to the 16th and 17th centuries
- Demographics: Latino/as represent a growing demographic constituent of the population of Arizona

This history and demographics have several implications for the arts:

- Latino/as remain an untapped resource for support and patronage of the arts
- Arts education stands to make a unique and positive impact in the educational success of young Latino/a students
- Funding and grant opportunities as well as exhibition spaces and gallery interest will increase the visibility of Latino/a artists

History of Latino/a Arts in Arizona: A Brief Overview

The current lively diversity in Latino/a arts within the state of Arizona continues a long artistic tradition, and its history is tied to a rich cultural and historical legacy. The state of Arizona was acquired by the United States in 1848 as part of the Treaty of Guadalupe Hidalgo. Prior to that date, however, the territory had been explored and settled by Spanish explorers, Jesuits, and Franciscan friars for nearly three hundred years. The land we now refer to as Arizona was part of Mexico until the mid-19th century.

During that time, the arts developed similarly to that in other parts of early colonial Mexico, much of which was closely tied to Roman Catholic liturgical traditions. Additionally, there was a strong emphasis on the cultivation of artistic talent within the context of the home. From the outset, Latino/a arts have included both public and private spheres of artistic expression. By the 19th and 20th centuries, Latino/a arts in Arizona had flourished and diversified to include Spanish and English language theatre, music, literature, crafts, and folk art, in addition to religious arts.

The Chicano Movement of the 1960s brought art to the forefront as a powerful means of expression in an era of political, racial, social, and economic transformation. As part of the broader sweep of the civil rights movements of that decade, the Chicano Movement highlighted art produced by Mexican-origin artists. During this period, artist-activists became widely recognized both within Arizona and nationwide, and the Chicano Movement was integral to establishing Latino/a art as an important area of contemporary artistic expression, as well as for laying the foundation for contemporary artists. More recently, there has been a gradual movement from communal to individual artistic expression. For example, in the 1970s, groups such as the one in Tucson led by Antonio Pazos painted large communal murals that had clearly articulated political messages. Tucson is home to 133 murals painted by Mexican-origin artists.[2]

The incredible diversity of Arizona's contemporary Latino/a artists, particularly those in the visual arts, gives voice to many different experiences and definitions of cultural identity within the state. Broad themes of community and family continue to be of central importance, and artists blend high and low art themes, satire, popular culture, multi-ethnic and religious symbolism and bright colors. The work produced often exhibits a striking combination of self-awareness, humor, and vitality, and is innately interwoven into a broader cultural context (Latino/a, Arizonan, and American) that reinforces, challenges, and reinvigorates individual and communal senses of identity. Latino/a artists and performers are proud of their cultural history and give voice to themselves as well as to their communities.

Demographics, Education, and the Arts

The Latino/a population in the United States has experienced tremendous growth in the past decade; within Arizona, it grew by 45% between 2000 and 2007. Latino/a individuals comprise roughly 30% of the population of the state, and represent a tremendous untapped resource in terms of support for and patronage of the arts. Bilingual supplementary materials, increased exhibition support, and community outreach are all potential ways to increase support of the arts within this community.

This growing demographic constituency undoubtedly means that more Latino/a artists can be expected to make their debuts in the coming decades, and the work they will produce will explore further what it means to be a Latino/a in the state of Arizona and in the United States at this particular moment in history. Support for these emerging artists, via non-profit agencies, galleries, and museums will be critical to ensure that this rich cultural legacy continues to be supported during a challenging economic period. There are a number of organizations in the state of Arizona that provide grant opportunities for artists, including the Arizona Commission of the Arts, the Tucson Pima Arts Council, the Arizona Art Alliance, the Arizona Latino Arts and Cultural Center (ALAC) in Phoenix, and the West Valley Arts Council.

Arts Education: Latino/a children accounted for nearly 87% of the total growth in the enrolled K-12 population over the last ten years. More than 75% of those under the age of six live in poverty. While there are many challenges to ensuring that Latino/a children receive the same education as their peers, it is clear that arts education, which has a great impact on children of any ethnicity, is poised to make a dramatic impact in the lives of Latino/a children by enabling them to directly engage their heritage. Such changes may be met with resistance. For example, in the summer of 2010 a mural at an elementary school in Prescott became the focus of heated debate. The artists who painted the mural were asked to lighten the faces of a Latino/a and African American depicted in the mural. The use of racial slurs and inflammatory language characterized the "debate." Issues of ethnicity and the arts within our public schools are hotly contested.[3] But increasing the diversity of artistic traditions included in educational programming, either within schools themselves or by museums, holds an enormous potential for positive impact.

The Law, The Arts, and The Economy

Recent legislation has had a strong impact on the Latino/a community, including those involved with arts and culture. On April 23, 2010, Arizona Governor Jan Brewer signed the Support Our Law Enforcement and Safe Neighborhoods Act, most commonly referred to SB 1070, into law. The broadest and strictest immigration measure in decades, it has spurred controversy and protest at the state and national level, catalyzing and polarizing the debate about immigration issues within the state and nationwide.

The state and national response to this legislation put Arizona in the spotlight and greatly impacted its tourism industry. Organized boycotts of the state have had a direct and detrimental impact on the tourism economy, with some estimates suggesting that the city of Phoenix could lose up to $90 million in the hotel industry alone.[4] Other reports suggested

that the losses from cancelled meetings and conventions cost the state $141 million in direct spending and that the economic impact of the legislation over the next two or three years would be $253 million in economic output.[5]

This economic impact extends to the arts and cultural sectors of Arizona, including the Latino/a arts community. A direct example occurred in 2010 when the Glass Art Society (GAS) cancelled its annual conference shortly following the passing of SB 1070. The conference was originally intended to have a Latin American focus and the initial explanation for the cancellation included a concern about issues directly pertaining to the legislation, though explicitly mentioned that the cancellation was not a boycott of the state. The GAS later clarified that the primary concern was economic.[6] In either case, the impact of this decision had a direct impact on the Arizona art community, as the conference focus on Latin American glass would have brought an international group of artists to the state. Since Latino/a arts specifically pertain to an ethnic group differentially affected by the recent legislation, it stands to reason that they have also been differentially affected by the social and economic impact of recent legislation.[7]

Artists responded directly to SB 1070, using social networking sites such as Facebook to provide a forum in which Arizona artists could communicate with their counterparts in other states. Ernesto Yerena of Los Angeles organized an art campaign in response to SB 1070 that he called Creative Resistance!, posting images on a web site (AltoArizona.com). Some artists have responded by asking their colleagues to continue to perform and exhibit in Arizona, rather than boycotting the state. In 2010, ALAC organized "SB 1070: An Artist Point of View."

Although little statistical information has been published, SB 1070 has affected Arizona's Latino/as communities as it has the rest of the state. But the situation also represents an opportunity, and Arizona's Latino/a artists are uniquely poised in this historical moment to make a significant contribution to the dialogue about immigration.

Arizona's Contemporary Latino/a Arts and Culture Community

Latino/a arts and culture has a strong presence in contemporary Arizona, as seen in the visual arts, theatre, and dance. A few examples will serve to illustrate this.

In the visual arts, strong communities of artists are well established in Phoenix and Tucson. Work by these individuals has been presented at museums and galleries. In 2009, when the Phoenix Art Museum hosted "Phantom Sightings," an exhibition of Latino art originated by the Los Angeles County Museum of Art, PAM curator Sara Cochran put together "Locals Only" to showcase the work of a dozen Chicano and Latino/a artists living and working in the Phoenix metropolitan area.[8] Founded in 2000, Tucson's Raices Talller is a community Latino/a based nonprofit cooperative art gallery and workshop.

Tucson's Borderlands Theater (founded in 1986) is recognized nationally and internationally for programs that reflect the diversity of the voices of the U.S./Mexico border region. Although its core voice is a Latino/a/Chicano/a one, Borderlands interacts with all of the voices of the region, recognizing the "border" as both a physical and a social landscape;

border people, in the best sense of the word, are citizens of the world. Also in Tucson is the Latina Dance Theater Project, a collaborative ensemble of multidisciplinary artists whose performances explore controversial issues impacting the global community, and reflective of the diverse Latin culture of today. In Phoenix, the Teatro Bravo, founded in 1998, produces plays that promote a complex portrait of Arizona's Latino/a and/or Latin American populations. It also seeks to develop the talents of Latino/a actors, directors, playwrights, designers, stage managers, and administrators. The Ballet Folklorico Mexicapan of Phoenix has been performing since 1981.

Finally, in December 2009 the Arizona Latino Arts & Cultural Center opened in Phoenix following the closure of the Museo Chicano in January 2009. (http://www.alacaz.org/). A consortium of Latino/a arts groups and independent artists, ALAC's goals include networking, professional training, advocacy, funding, and arts education, as well as fostering understanding between Latino and non-Latino artists, art organizations, media, and communities.

Ann Seiferle-Valencia, a Chicana from New Mexico, holds a Bachelor's degree from the University of Arizona and Master's and Doctorate degrees from Harvard University with specialties in pre-Columbian material culture and early colonial pictorial manuscripts. Prior to becoming Curator of Latin American Art at the Tucson Museum of Art in 2010, she was a lecturer in the Department of Anthropology and a postdoctoral research fellow at the Peabody Museum of Archaeology and Ethnology at Harvard University. Her research interests are centered on the uses of Mesoamerican iconography, both in pre-Columbian art and by contemporary Latin American artists, as a means of self and communal representation. Her approach to Latin American art is rooted in an anthropological perspective, seeking to contextualize art in the social and cultural context in which it was created and how this context changes through time.

1 See, *State of Latino Arizona* (Arizona Board of Regents, 2009). This is an excellent resource for those interested in Latino arts and, more broadly, Latino issues within the state of Arizona. The report addresses a number of issues pertaining to Latinos in the state of Arizona such as the history of Mexican origin populations in Arizona, demographics, politics and civil rights, education, economic and financial issues, health, and arts. More specifically, the chapter on the arts presents an overview of the origins and development of Latino theatre, literature, film, music, and the visual arts in Arizona. Essayists and topics included: F. Arturo Rosales and Christine Marín, "Histories of Mexican Origin Populations in Arizona;" Eileen Diaz McConnell and Amanda Skeen, "Contemporary Characteristics of a Dynamic Population;" Lisa Magaña, Miguel Montiél, and James Garcia, "The Impact of Politics, Legislation, and Civil Rights on Arizona Latinos;" Paul Luna, "Each of Us Has a Role;" Eugene Garcia,, Mehmet Dali Oztürk, and J. Luke Wood, "The Critical Condition of Latino Education in Arizona;" Bárbara Robles and Loui Olivas, "Economic Mobility: Earnings, Income and Wealth Indicators;" Hilda García-Pérez and Seline Szupinski-Quiroga, "Toward a Healthy Latino Population in Arizona;" and Carlos Vélez-Ibáñez, Paul Espinosa, James Garcia, Marta Sanchez, and Michelle Martinez, "Genesis and Development of Latino/a Expressive Culture in Arizona: Theater, Literature, Film, Music, and Art." My statistics have been largely drawn from this report. (http://www.asu.edu/vppa/asuforaz/downloads/state_of_latino_arizona_report.pdf). See also the MPAC report, *Arts, Culture and the Latino Audience: Latino Arts and Culture Participation in the Greater Phoenix Region* (Phoenix: Maricopa Partnership for Arts and Culture 2008).

2 See Carlos Vélez-Ibáñez, *Border Visions: Mexican Cultures of the Southwest United States* (Tucson, University of Arizona Press, 1996) and *Murals* [booklet with map] (Tucson: Tucson Pima Arts Council, 1993).

3 http://www.nydailynews.com/news/national/2010/06/04/2010-06-04_arizona_school_asks_artists_to_lighten_face_of_hispanic_student_on_mural.html

4 http://www.azcentral.com/arizonarepublic/local/articles/2010/05/11/20100511phoenix-convention-center-boycott.html

5 http://www.enewspf.com/latest-news/latest-national/20017-arizonas-immigration-law-and-the-cost-of-can celled-conferences-and-conventions.html

6 http://washingtonglass.blogspot.com/2010/05/glass-arts-society-cancels-arizona.html, http://blog.glassquarterly.com/2010/05/08/2011-tuscon-gas-conference-cancelled-date-changed-new-location-yet-to-be-announced/

7 On May 12 2010, Governor Brewer signed HB 2281, which prohibits a school district or charter school from including in its program of instruction any courses or classes that promote the overthrow of the United States government, promote resentment toward a race or class of people, are designed primarily for pupils of a particular ethnic group, and advocate ethnic solidarity instead of the treatment of pupils as individuals. The legislation targeted the Tucson Unified School District which had a program offering specialized courses in African-American, Mexican-American, and Native-American studies.

8 See Gary D. Keller and Mary Erickson, and Pat Villeneuve, *Chicano Art for Our Millennium: Collected Works from the Arizona State University* Community (Tempe: Bilingual Press, 2004).

Cultural Institutions Outside the Metropolitan Mainstream

Arizona possesses many cultural treasures outside of the metropolitan areas of Phoenix and Tucson. Anyone who has traveled throughout the state has experienced the happy surprise of discovering such places, which often represent an Arizona that has been erased elsewhere through the vigorous development that has destroyed many of the tangible reminders of our rich history. The five essays that comprise this chapter have been written by the directors of Arizona institutions in Flagstaff, Wickenburg, Bisbee, Dragoon, and Window Rock. Collectively they map the geography of our large western state. Further, they convey the challenges of presenting and preserving the arts and culture of Arizona in more remote locations. They struggle daily with how to sustain their communities, how to make significant state heritage relevant to new generations, and how to do so in a challenging economic climate.

Preserving the Natural and Cultural Heritage of the Colorado Plateau

Robert Breunig, Executive Director, Museum of Northern Arizona

The Museum of Northern Arizona (MNA) in Flagstaff, is an outstanding example of a *place based* museum, a regional institution. The museum is devoted to the study and interpretation of a specific part of the world, in this case the 130,000 square mile Colorado Plateau, which encompasses northern Arizona, southern Utah, and parts of western Colorado and New Mexico. The museum was founded in 1928 by citizens of northern Arizona who were concerned about the growing loss of the natural and cultural history of the region. Even some of the scientific expeditions of the time created concerns, as archaeological sites and materials were excavated by scientists from eastern U.S. institutions (such as the Smithsonian Institution) and were sent back East, never to be seen in Arizona again. The primary founders of the museum were a remarkable couple from Philadelphia who began visiting Flagstaff in 1912 and who settled permanently in northern Arizona in 1926. Dr. Harold Sellers Colton was a scientist, and his wife Mary-Russell Ferrell Colton was an artist and an art educator. Together, they built an institution devoted to both science and art—and to their interconnections.

Since its founding, the museum has engaged in three principal activities: research on the geology, paleontology, archaeology, ethnology, biology and ecology, and art of the Colorado Plateau; exhibits and educational programs that "tell the story" of the region, and the building and preservation of collections that document these various disciplines. MNA's collections contains more than 560,000 individual items plus bulk collections and archives, 9,000 sq. ft. of bulk material and archival documents and photographs. The majority of these collections are now housed in the museum's new Easton Collection Center, a 17,000 square foot state of the art Platinum LEED facility completed in 2009 with

private funding from one individual source. The museum has also had an active publications program for both lay and professional audiences. MNA is (and was among the first to be) accredited by the American Association of Museums; as a model regional museum it maintains a tradition of excellence that draws upon universal concepts, principles, themes and standards to accomplish its mission.

Recent MNA research initiatives have included the excavation of nine archaeological sites along the Colorado River corridor in the Grand Canyon; the ancient biodiversity of the 93 million year old Cretaceous Interior Seaway as revealed in the Tropic Shale of the Glen Canyon region; continuity and change in Hopi iconography over the past one thousand years; and the biodiversity of springs on the Colorado Plateau, with an emphasis on the management of springs on tribal lands.

In its exhibits program, the museum strives to maintain a balance of science and art exhibits, looking at the Colorado Plateau from diverse perspectives, and featuring the work of native and non-native artists, and the research results of MNA scientists. The high biodiversity inherent to our geography provides us outstanding opportunities for biological research. Likewise, the exposed stratigraphy of rock layers on the Colorado Plateau provides outstanding opportunities for both physical geology and paleontology studies. And because the museum is adjacent to the largest U.S. populations of American Indian descent, it stands in a unique position to collaborate with Apache, Hopi, Navajo, Pai, and Zuni peoples—and since its inception those who have supported the museum have found tremendous joy and satisfaction/accomplishment in focusing on the art and culture of this diversity.

The 2011 exhibits will feature Zuni Map art, in partnership with the A:shiwi A:wan Museum at Zuni Pueblo, which looks at Zuni perspectives on their own traditional cultural territory. The museum will host four festivals of arts and culture that annually draw over 10,000 visitors: the 78th annual festival with Hopi artists and cultural leaders, 57th for Navajo, 5th (reinstated) festival for Zuni, and 6th *Celebraciónes* festival for our region's Latino/Hispanic community. These "Heritage Festivals" provide some of the best opportunities for cross cultural exchange in the region. A special art exhibit of painter Bruce Aiken and science exhibit on MNA's recently completed 5-year archaeological project in the Grand Canyon demonstrate the museum's commitment to presenting and interpreting the science, culture, and art of the region. The museum will also continue its tradition of publishing outstanding bulletins and magazines for both scientific and lay audiences.

Perhaps the greatest challenge for the Museum of Northern Arizona is providing funding for a significant, multidisciplinary, private regional museum in a town of 60,000 people. While projects in research, collections management, publications, exhibits, and education are recognized as having national and international, as well as regional significance, most large private foundations do not accept funding applications from institutions located outside major metropolitan areas. In MNA's case this is particularly frustrating as a large percentage of visitors are from the greater Phoenix metropolitan area. Additionally, state and federal agencies as well as private foundations have, in recent decades, largely limited funding to new initiatives rather than operations. Recent deep cuts to the few unrestricted sources of operating grants that have remained, along with shrinking private funding in the current economy, have forced

major cuts in staffing and general funding at MNA, despite MNA's commitment to a diverse funding program that includes gifts and grants from individuals, public agencies, private foundations, earned income, and performance contracts.

Looking to the future, MNA believes that institutions that connect people to real places and which hold and preserve the physical evidence of our natural and cultural heritage will become more important in a world that is increasingly enamored with the general and the virtual.

Presenting Western Heritage in a Seasonal Community

W. James Burns, Executive Director, Desert Caballeros Western Museum, Wickenburg

While located in Maricopa County, Wickenburg can hardly be considered urban, with a population of roughly 6,400 year-round residents. One of the challenges of running a cultural institution in Wickenburg is the transient nature of its residents. The same is undoubtedly true for many rural communities in Arizona with visitors and residents who spend anywhere from a few weeks to a few months at best each year in residence.

Permanent and part-year residents alike in Wickenburg talk about "the season," which runs roughly from October through April. The community—and the institutions in it—revolves around the season, a situation that presents some opportunities but also some challenges. There is a distinct buzz among the cultural institutions in town during the season, but ultimately resources must be allocated to operate all year long.

How does one run a cultural organization when a majority of the members, trustees, and volunteers are half-year residents and attendance fluctuates significantly between summer and winter? To sustain our organizations through the summer cultural organizations scale back and try to do more with less. As so many have had to do in these tough economic times, sacrifices are made.

Arts organizations in Wickenburg concentrate the bulk of their programming during the winter season, infusing the town with a rich cultural life usually found in much larger cities. The community takes pride in the Del E. Webb Center for the Performing Arts and Desert Caballeros Western Museum, which celebrated its 50th anniversary in 2010.

These institutions focus on cooperation and collaboration to maximize their limited resources. The museum and the center rely on a similar, limited pool of donors and volunteers. When possible organizations work together and forge partnerships with others in town and throughout the metro area.

Some of the challenges faced are to expand our audiences, funding sources, and membership beyond Wickenburg. Success in expanding audiences and attracting new patrons has implications for the town as well. Wickenburg possesses a fortuitous location on the well-traveled highway between Phoenix and Las Vegas, but getting travelers to stop is a challenge.

If travelers do stop they tend to shop and eat, which translates into tax dollars for the community and sales for local businesses. The museum has been successful in attracting over

56,000 visitors a year, nearly 75% of those from outside Wickenburg. That represents a significant contribution to economic development in a community that has very little industry.

While prominent, the cultural institutions in Wickenburg face a challenge in building bridges with business owners and residents in the community. Cultural institutions struggle to meet the needs and appeal to the interests of full-time residents as well as part-year residents and visitors. Figuring out how to serve all of those constituencies is a daily challenge.

In this tough post-Great Recession economy, cultural organizations seek more than ever to create relevant connections with their communities. Some are doing so with half of the pre-recession human and financial resources, largely through the spirit of volunteerism that is particularly strong in rural communities.

Telling Stories

Carrie Gustavson, Director, Bisbee Mining & Historical Museum

Arizona possesses a remarkable landscape, which framed by the borders of our geographically large state, has created its distinctive sense of place. But it is not defined by a single community, be it a Phoenix or a Bisbee, but rather by the startling diversity of its places and people, each of which has a distinctive story to tell. These chronicles represent a multitude of voices and narratives which are celebrated by the many cultural organizations located in rural Arizona.

The rural Arizona of a place like Bisbee, distant from the state's major urban centers, derives its identity neither from the many legislative decisions made by government officials in metropolitan Phoenix nor from the headlines randomly picked up by state or national media. The experience of rural Arizona is more immediate, an intrinsic part of our lives. We are all—past, present, and future—part of the story.

The Bisbee Mining & Historical Museum is a community history museum, and like other rural institutions throughout the state, plays a significant role in interpreting how Arizonans understand their shared heritage, assess the present, and plan for the future. As common tradition fades, Arizona's hundreds of smaller rural museums assume the stewardship of teaching communities the importance of not only preserving history, but of understanding the nature of the history we seek to preserve, and the lessons it offers for today.

Community museums are, in essence, in the front line of the history business, and collectively such histories of which they are guardians are the foundation of our image as a state. But community museums could improve their impact by looking beyond their local communities to weave their local and regional stories into an understanding of the collective experience of Arizona as a whole.

The story of Bisbee's mines is anything but a local one. Arizona is known as the copper state, and mining was the transformative industry of the American West, with Bisbee as an important arena in which social and economic issues of statewide and national importance were played out. Some of the richest copper mines in the world were located here, and it was once the

financial center of the Arizona territory. Bisbee was typical of the commodity-producing towns that once defined vast areas of the American West, and this is a remarkable story to celebrate.

As cultural institutions, we can be central players in the economic well-being and revitalization of our respective communities—a responsibility key to the survival of rural museums need to assume in order to survive. Mining has always been a volatile enterprise, and with the closure of most of its mines during the mid-twentieth century, Bisbee reinvented itself by capitalizing on its history, aligning itself with the growth of Arizona's tourism industry. Today's Bisbee prospers because of this transformation and the lively diversity of its residents, whose creative energy is rooted in a powerful blend of historic preservation and the arts.

Underlying the Bisbee Mining & Historical Museum's conceptual framework of preserving and promoting a vibrant cultural heritage is the hardrock reality of economic sustainability, both for local institutions and communities. In Bisbee, residents work together to both enhance the tourism experience, and to sustain the unique sense of place of the community. Such collaboration preserves the unique rural heritage of Bisbee, while adding to a shared sense of belonging.

A Well-Kept Secret

John A. Ware, Executive Director, The Amerind Foundation, Dragoon

The Amerind Foundation was established in 1937 as an archaeological research institute dedicated to the advancement of knowledge about the Native Peoples of the Americas. The Amerind campus is located on a 1600 acre former cattle ranch in Texas Canyon, northern Cochise County, about sixty miles east of Tucson. Amerind's founder, New England industrialist William Shirley Fulton, chose this location because he wanted Amerind's research efforts to be far from the distractions of a major metropolitan area.

During its first fifty years the Amerind conducted excavations at over two dozen archaeological sites in the Southwestern Borderlands, culminating in the multi-year Joint Casas Grandes Project in northern Chihuahua—one of the largest archaeological projects ever conducted in the Southwest. The nature of archaeological research and funding for basic research began to change in the 1960s and by the late 1970s it was no longer possible for small research centers to compete for scarce federal research dollars. As the discipline changed, the Amerind adapted by modifying its mission. Since 1980 the Amerind has supported the basic research of others through advanced seminars, a visiting scholar program, and professional publications. Today, the Amerind sponsors up to ten advanced seminars a year through an active collaboration with the Society for American Archaeology, the University of Arizona, Arizona State University, and other regional universities.

Within a few years of its founding the Amerind established a museum and art gallery to exhibit its growing collection of art and artifacts. Open to the public only by appointment, the Amerind Museum would eventually house one of the finest private collections of American Indian art and material culture in the country, but it remained, by design, a closely kept secret during its first fifty years. In a letter to a colleague in the 1960s, long-time Amerind director

Dr. Charles C. Di Peso said that they were lucky to have had only two visitors to the Amerind Museum that month, so there were few distractions to getting an important research project written up!

In 1984 the Amerind opened its museum and fine art gallery to the walk-in public and visitation steadily rose to the current level of 12-15,000 visitors a year. The Amerind is truly a rural museum, and there are advantages and disadvantages to being in the "middle of nowhere." Other than the spectacular rock formations of Texas Canyon and the beautiful sunsets of southeastern Arizona, visiting scholars and advanced seminar participants have few things to distract them from their important work. On the other hand, the Amerind is an hour's drive from Tucson and Sierra Vista and twenty minutes to the nearest restaurant, grocery store, or pharmacy. Moreover, Cochise County has very little wealth, few corporations, even fewer non-profits, and almost no history of philanthropy. Without a solid community of support, fund raising for new programs and capital improvements is difficult, to say the least. As the Amerind approaches its 75th anniversary in 2012, its biggest challenge will be to transform a closely kept secret into a household name and popular visitor destination. As a cultural attraction, it will contribute to the economy of this remote location.

Tribal Museums: From Display Cases to Cultural Preservation

Manuelito Wheeler, Director, Navajo Nation Museum, Window Rock

A current trend in museums nationally is to be more in tune with their communities and not operate as empirical institutions. The Navajo Nation Museum, for example, operates by this trend. The Museum opened in 1961 with the help of the Navajo Council, and initially and for some decades it functioned as an anthropological museum having historical exhibits and displaying artwork. Currently the Navajo Nation Museum's mission statement is "Striving to achieve hozho through contemporary and traditional exhibits, programs, and tours; To promote our Diné culture, language, history, and sovereignty." (hozho is a Navajo word meaning harmony, balance, spiritual beauty).

Tribal museums throughout Arizona are evolving into cultural preservation centers. Topics of language preservation, traditional religion retention, and public display appropriateness are some issues at the forefront of tribal institutions. It was unforeseen that tribal museums would be in positions of cultural preservation and salvation.

Supporting local artists is another obvious goal of museums, tribal or not. This task is a little more complicated for tribal members because the definition of Native art is fuzzy and sometimes controversial. Traditional art and contemporary art for Indian people carry with them rules of what is appropriate. These issues are to be kept on the periphery but we must not lose sight of supporting local artists. Many artists who live on the reservation have little experience dealing with museums, assembling a portfolio, or even visiting museums and galleries. Many of these talented reservation artists remain undiscovered.

At the Navajo Nation Museum, having Navajo staff members has the benefit of the inherent understanding of Navajo culture, which is as diverse as its people with regional beliefs, politics, and minor linguistic differences. Thus the staff can share common cultural knowledge as well as defering to traditional specialists for more sacred knowledge.

Being one of the twenty-two tribes in Arizona, the Navajo Nation is infused in Arizona's history and pride. The capitol and home of our state government is Phoenix. Such geographic distance seems to cause a disconnect from Navajo people and the state capitol and its residents. Opportunities exist to create an institution that will excite and encourage Arizona to hear and learn as we tell our own stories. Each tribe has its own story, and they are centuries-old oral histories that now manifest themselves in our tribal museums. Tribal museums continue to play a central role in preserving tribal cultures.

Robert G. Breunig is Executive Director of the Museum of Northern Arizona (MNA). Since returning to MNA as director in 2003, Dr. Breunig has over seen the development of the $ 7.5 million Easton Collection Center, a state of the art collections repository; major improvements to the campus of the Harold S. Colton Research Center; reaccreditation by the American Association of Museums; and significant growth of the museum's endowment funds. Dr. Breunig earned a Ph.D. in Anthropology from the University of Kansas, in 1973. In the 1970's and early 1980's held several positions at the Museum of Northern Arizona including Museum Educator, Curator of the Museum, and Curator of Anthropology. In 1982, he became the Deputy Director and Chief Curator of the Heard Museum in Phoenix. He has also served as Executive Director of the Desert Botanical Garden (1985-1994), the Santa Barbara Museum of Natural History (1994-1997) and the Lady Bird Johnson Wildflower Center (1997-2003). In 1991, President George Bush appointed Dr. Breunig to the fifteen-member National Museum Services Board, the governing board of the Institute of Museum and Library Services. In 1994, President Bill Clinton re-appointed him to this board, on which he served until November 2002. Dr. Breunig currently serves as a Commissioner of the Arizona Commission on the Arts.

W. James Burns is Executive Director of the Desert Caballeros Western Museum in Wickenburg. He holds a B.A. in History from the University of Arizona, an M.A. in Public History from Arizona State University, and a Ph.D. in Educational Policy Studies from Georgia State University. His M.A. thesis (1994), *Gateway to the Colorado Plateau: A Portrait of the Museum of Northern Arizona* was an institutional history of MNA. His dissertation, *We Must Grow Our Own Artists: Mary-Russell Ferrell Colton, Northern Arizona's Early Art Educator* (2010), focused on the contributions of the co-founder of the MNA to the progressive education movement and the Native American arts and crafts movement. Burns is a graduate of the Museum Management Institute at the Getty and has worked in history, anthropology, and art museums since 1990 at institutions in Arizona, Georgia, Virginia, and Louisiana, including the Museum of Northern Arizona, the Booth Western Art Museum, the Louisiana State Museum, the Jamestown-Yorktown Foundation, the Tempe History Museum, and the Atlanta History Center. Burns' research interests include the cultural, social, and environmental history of the American West. He has served on a number of state and regional museum association boards and currently serves as the Vice-Chair of the Curators' Committee of the American Association of Museums and as a peer reviewer for the Museum Assessment Program.

Carrie Gustavson grew up learning about other cultures and people around the world through the United Nations IAEA program. Returning to the United States, she received her advanced degrees in Near Eastern Studies from UCLA/University of California, Berkeley, and the University of Toronto. Based in Europe, her archaeological career focused on the Chalcolithic cultures along the Fertile Crescent through the Mediterranean littoral in the Middle East. Twenty years ago, she returned to the United States and completed her graduate certificate in Museum Studies at Arizona State University. As the Director of the Bisbee Mining & Historical Museum, she has led it to state and national recognition for museum excellence and award-wining interactive exhibitry. Also under her leadership, the Museum became the first rural affiliate nationwide of the Smithsonian

Institution's Affiliation Program and was nominated by Congress to the Library of Congress Local Legacy program. As founder of the Cochise County Museum Association, she designed the small museum, professional development curriculum for Cochise College, and currently co-chairs the Cochise County Arizona Centennial Committee. She served fifteen years on the Museum Association of Arizona governing board, is a member of the Arizona Humanities Council governing board, and the Arizona Centennial Legacy Committee.

John Ware, a fourth-generation Arizonan, is an anthropologist and archaeologist whose research and teaching focus is on the prehistory and ethnohistory of the northern Southwest, where he has worked for nearly forty years. Ware earned his Ph.D. in anthropology from the University of Colorado in 1983 and has taught anthropology at Southern Illinois University, the College of Santa Fe, and Colgate University in Hamilton, New York. In addition to teaching, Ware has held research positions at the Museum of Northern Arizona, Arizona State Museum, Colorado State Museum, and School of American Research, and he was director of the Laboratory of Anthropology in Santa Fe. Since 2001 Ware has served as executive director of the Amerind Foundation in Dragoon.

Manuelito Wheeler was born and raised on the Navajo Nation and is currently the Director of the Navajo Nation Museum in Window Rock. He is Tsi'naajini (Black Streaked People), born for Ye'ii Tachii'nii (Red Running into Water People). Since 2008 he has served as the tribe's museum director. In collaboration with the other museum staff, they have completed more than eight exhibits, all produced in-house. He has over twelve years of exhibit development experience that includes concept, design, construction, and installation. Prior to his current position, Wheeler spent more than ten years working at the Heard Museum in Phoenix, and rose through the ranks from carpenter's assistant to creative director. While at the Heard, he installed more than 75 exhibits, including traveling exhibits from the Smithsonian Institution and the Autry Museum. He is a graduate of Arizona State University and resides in Fort Defiance, Arizona with his wife and two sons.

Public Art: Placemaking, Community Engagement, and Economic Impact

Edward Lebow
Public Art Program Manager, Phoenix Office of Cultural Affairs

Valerie Vadala Homer
Director, Scottsdale Public Art Program

Key Points

- The first American city to establish a public art program was Philadelphia in 1959
- Arizona's first piece of Public Art was Solon Borglum's 1907 memorial to
- Bucky O'Neill in Prescott
- Public Art has invigorated urban infrastructure
- Art and culture, including Public Art, are key ingredients of urban vitality
- Communities that have invested in Public Art have made them better places to live
- Public Art creates a sense of place, strengthens civic identity through memorials and monuments, and contributes to community engagement
- Public Art projects provide 50 times the economic impact of events in traditional venues.
- Public Art generates jobs and visibility for Arizona workers and firms

Public Art: Some History

In 1959, Philadelphia was the first city in America to establish a public art program. During the seventies and eighties public art programs proliferated and sprouted up in nearly every state in the nation. Today there are more than 350 public art programs across the country. Communities have invested in public art to make them better places to live, work, and visit.

Phoenix, Scottsdale, and Tucson all adopted public art ordinances between 1985 and 1989. Phoenix's public art master plan noted that the city was considered by many to be a "cultural desert" and that the perception was resulting in business and industry locating elsewhere to more hospitable, culturally rich environments.

Historically, public art programs have been funded with a percent-for-art mechanism. Such funding results when one percent for a building project—a new library, a roadway, a municipal facility—is earmarked and set aside for artwork that is then sited within or near the project. More recently cities outside Arizona have opted to fund projects at an even

greater level: 2 -2 ½ percent. As we move into the next decade we must consider whether the percent based funding model is still viable. Many of the cities that adopted ordinances in the seventies and eighties are reaching build-out and are no longer constructing new facilities and infrastructure at a rate that can continue to support such a proliferation of art. Accordingly, new program models and funding mechanisms will need to be developed if we want to ensure sustaining a cultural and arts legacy for future generations.

Public Art and Infrastructure

Cynics joke that public art is neither; that it has no audience, and that an art presumably shaped by compromise isn't worth seeing. Yet, this oft-repeated cliché doesn't explain why thousands of people turned out in Scottsdale last December to dedicate visionary architect Paolo Soleri's new bridge across the Arizona Canal, or why, on a warm summer day in 1907, thousands thronged the square outside Prescott's Yavapai County Court House to welcome the arrival of Arizona's first formal work of public art, sculptor Solon Borglum's memorial to *Bucky O'Neill and the Rough Riders*. Repeated whenever communities gather to celebrate expressions of common purpose, these events and the works they celebrate belong to a cultural continuum that may be older than any other in Arizona. Stretching back more than a millennium to the petroglyphs that indigenous artists chipped into the dark faces of hard rock, public art has evolved over the past century into a wide-ranging barometer of community vitality.

Like all things public, this evolution has come with plenty of debate. Touted by some as worthy monuments to history, bravery, and community resolve, or as symbols of cultural advance and catalysts of new thinking about urban design, public art in Arizona, as it is elsewhere, has also been derided as a waste of money, and an imposition of unwanted taste.

Yet, in the past forty years, the nay-saying has done little to stifle the advance of new, innovative, and award-winning public expressions here. Evolving far beyond Borglum's bronze horse and rider that began the field's modern cultural charge, Arizona's array of public art has involved artists in designing everything from highway sound walls and pedestrian bridges, bicycle paths, city streets, parks, and bus shelters to transit systems, canal trails, airport terminals, recycling centers, waterfronts, urban furnishings, and more.

Fueled by municipal percent-for-art ordinances enacted in the 1980s, this wave of investment—more than $35 million in Phoenix alone—has amounted to the most ambitious effort to involve artists in public works since the WPA murals program of the Great Depression. The results have earned Phoenix, Scottsdale, and other Arizona cities praise as national models for merging art with infrastructure to make its communities more beautiful, interesting, and livable.

One doesn't have to look very hard to see the extent to which artists have shaped our urban landscapes. Prescott's *Bucky O'Neill and the Rough Riders*, Glendale's recently unveiled Public Safety Memorial, and Tucson's figures of Doc Holliday and Wyatt Earp outside the city's old train station, show public art's traditional power to commemorate the history of people and place.

Rosario Marquardt and Roberto Behar's extraordinary *Magic Carpet* of terrazzo in the Biltmore underpass at Camelback Road, Teresa Villegas's sparkling terrazzo floor at Phoenix Sky Harbor International Airport's Terminal 3 baggage area, both in Phoenix, the spectacular tile of the Miracle Mile bridge along Interstate 10 in Tucson (1993-94), and *The Path Most Traveled* (2001), Carolyn Braaksma's elaborate, desert-inspired images cast into six miles of sound walls along the Pima Freeway in Scottsdale highlight the sensuous detail that public artists have returned to public design.

Janet Echelman's *Her Secret is Patience*, in Phoenix's new Downtown Civic Space Park, Simon Donovan and T.Y. Lin International's *Diamondback Bridge* (2002) in Tucson, and Linnea Glatt and Michael Singer's design for the 27th Avenue Solid Waste Management Facility (1993) in Phoenix, to cite just a handful of projects, underscore how public art has invigorated the meaning and function of new public infrastructure.

The striking aspect of these and other notable recent works of public art is that they attempt to change more than just the appearance of things. They alter and expand the functions of them, raising questions and expectations about what the experience of public infrastructure should be.

This shift of creative emphasis from merely making or decorating things to inventing or expanding functions is hardly new. It has long been a central tenet of American industry, where, as the digital age has proven, the discovery of new functions has meant the development of new needs, inventions, demands, and, potentially, new markets and economic growth. The benefits in this arc of progress and profits have been quantifiably clear ever since Thomas Edison's leap from oil lanterns to light bulbs sparked the search for products and systems to meet the needs and exploit the opportunities of modern illumination.

The quality of the vitality and pizzazz that public art brings to our cities is far more difficult to measure. But the questions—and answers—it brings to the design of public places have been fairly clear.

- Should a road be designed exclusively to move cars? Or should it accommodate shaded sidewalks and bus shelters for pedestrians and transit users, as have a number of streets projects designed through collaborations with artists and landscape architects?

- Does a bridge need to follow a formula proven and repeated elsewhere, or could it offer an iconic new form to pique the public imagination, as have many of the bridges that Phoenix, Scottsdale, Tucson, and ADOT (via transportation enhancement funds) have de have designed through artist and engineer collaborations?

- Should a recycling center be built solely to handle trash, or could it double, as the 27th Avenue Solid Waste Management Facility was intended, as a public education center of "green" thinking?

All of these questions amount to an impertinent, "What if?" What if beauty, delight, multiple use, and other qualities that make great places tick were added to the design of public works? These, in fact, were the questions raised when public art programs were enacted back in the 1980s. They weren't the brainchild of artists. They were fueled by the widespread feeling among civic, community and corporate leaders that too many of the region's resources were going into raw growth, too few into the cultural amenities and life that attract new talent and businesses, and make cities livable and great.

This was especially true in Phoenix, where, between 1950 and 1980, development had transformed the city from a modest seventeen square miles with 106,000 residents to a sprawling 329 square miles with a population of nearly 800,000.

The notion that art and culture were key ingredients of urban vitality got a boost from separate studies of the city by urbanists Herman Kahn and Neal Peirce. "Essentially, they said that this could be a great place to live," recalled Athia Hardt, a former *Arizona Republic* writer and volunteer in Phoenix's successful 1988 bond election campaign, which fueled the city's cultural investments. "The weather is great. The scenery is great. The air is still not too bad, but the city lacks the underpinnings of society and culture that make companies and people want to stay here for the long haul."[1]

In his report, published in the *Arizona Republic* in 1987, Peirce zeroed in on the region's longstanding failure to support and invest in the arts, saying that its scorn for the high arts was a rejection of "what Western Civilization for centuries has found to be one of the great frontiers of the human spirit." This was causing the city to turn its back on its chance to become a world-class city.[2]

Now a fixture in most of the state's major cities, public art has helped to fill the void of cultural indifference that Peirce identified in the Phoenix region. The projects range from temporary to the permanent, from passing installations along the waterfront in Scottsdale and performances at Glendale's Annual Jazz & Blues Festival to freeway walls in Scottsdale and Tucson, Scottsdale's *Loloma Transit Center* (1997) by artist Vito Acconci and architect Doug Sydnor, and James Turrell's contemplative *Knight Rise Skyspace* (2001) at the Scottsdale Museum of Contemporary Art.

In the coming years, Phoenix's public art program will add major new artworks as part of the Tres Rios Wetlands project, large-scale terrazzo and glass works for the planned PHX Sky Train, which, in 2013, will begin carrying travelers between the terminals at Sky Harbor Airport to the region's light rail system station at 44th Street and Washington, and a new artist-designed entrance to the Pueblo Grande Museum, across the street from that light rail stop.

Beyond these ambitious projects lies the question of how public art and its reputation for innovation in Arizona will fare as the municipal budgets fueling it shrink. The question isn't exclusively local. It challenges public art programs nationwide. Part of the answer exists in developing the kinds of public/private partnerships (Scottsdale has an Art in Private Development ordinance, as does Tempe and Avondale) and event-based programming that the Scottsdale Public Art Program is pursuing.

What Does Public Art Do for a City?

Placemaking: When we think of great cities we think of great art and cultural markers: memorials, monuments, public sculpture. New York's *Statue of Liberty* (dedicated 1886) and Paul Manship's golden *Prometheus* above the ice skating rink at Rockefeller Center (1934), the *Chicago Picasso* (1967), the St. Louis Gateway Arch (1963-65) by Eero Saarienen, and the great monuments of Washington—the *Lincoln Memorial* (1914-22), the *Washington Monument* (1848-84), and the *Vietnam Veterans Memorial*.

In 1969, Grand Rapids, Michigan, used percent for art funding, the first National Endowment for the Arts grant for Art in Public Places, and contributions from local philanthropists, businesses, and individuals to commission Alexander Calder's *La Grande Vitesse*. The decision was bold, visionary, and highly controversial. Today the sculpture is inseparable from the city's identity and a strong point of community pride. Since the seventies, public art programs have been the main impetus and funding source for such public sculptures, monuments, and memorials.

Memorials, Monuments, Shared Histories: In 1980, twenty-one year old Yale undergraduate architect Maya Lin was selected from nearly 1,500 submissions to create a memorial to those lost in the Vietnam War. The spare, elegant, minimal memorial was the subject of so much controversy that it seriously threatened its realization. Since that time "the Wall" has grown to be one of the most revered memorials in the world. It is the site of pilgrimages of families and friends and countless others, making it one of our nation's most sacred places.

Cultural Identity: To celebrate and strengthen civic identity, Portland commissioned sculptor Raymond Kaskey to create *Portlandia* in 1985. The monumental allegorical figure of Commerce, a classically styled woman with a trident, was inspired by the official city seal. It is the second largest copper sculpture in the country—the largest being the *Statue of Liberty*. The sculpture arrived amid much fanfare and was carried on a barge down the Willamette River. Thousands of citizens heralded its arrival, following it as it progressed down into the city. *Portlandia* has become a new symbol of vitality and commerce for an emerging American city.

Community Engagement

The Hyperbolic Crochet Coral Reef Project: The brainchild of Margaret and Christine Wertheim, the project, which has traveled to different venues, was created to bring awareness to the overuse of plastic and its toxic effects on our oceans—in particular its coral reefs—and the larger impact on the planet. The project begins by bringing together community members and teaching them to crochet a simple form. Each crochet is a hyperbolic—a gently curving spiral—form that looks remarkably like actual coral. Thousands of individuals have contributed to create the Institute for Figuring's *People's Reef* that is currently traveling the world bringing awareness to the plight of our oceans. Project participants report changing their behavior by lessening use of plastic and adopting new recycling practices. Project participants also forge new friendships and alliances that continue long after the project is completed. Public art is a vehicle for community engagement that inspires and changes lives.[3]

Public Art: Investment and Return

In the face of the new economy we must ask: can we still afford to fund public art? Does it provide a good investment and return? In recent years, numerous communities have made significant investments in arts and culture in order to remain vital and dynamic. *Public Art Review* editor Jack Becker believes: "An average public art project provides 50 times the economic impact of art events in traditional venues, yet the cost to the public for public art is less than 50 cents per taxpayer per year." It also generates "ten times the media attention that other art forms receive."[4]

Public art also generates jobs and visibility for Arizona workers and firms. A survey of 32 recent Phoenix public art projects revealed they supported 1,200 jobs, 1,133 of them in Arizona. The Janet Echelman sculpture *Her Secret is Patience*, at Phoenix's new Downtown Civic Space Park, alone involved nearly 150 workers. As with many other public art projects, they covered the gamut of engineering, construction, and fabrication trades.

The appeal of the art projects, said Kyle Peyton of CAID Industries, a large-scale Tucson metal fabricator which oversaw construction of the Echelman sculpture and fabricated the stainless steel metal cladding for Scottsdale's Paolo Soleri bridge, is that their uniqueness requires engineers and fabricators to raise their own creative bars, solving problems as exceptional as the artworks. Peyton stressed that iconic public art projects also raise the visibility and business prospects of Arizona firms. CAID's involvement in public art here has led directly to the development of public art projects nationally and overseas.

Dynamic Time Based Artworks

Projects like the *Chicago Cows* (1999) and Christo's *Gates* (2005) drew international acclaim and attracted visitors from across the world. Such destination attraction projects inspire residents and tourists to engage and explore their environment.

Chicago Cows: The Chicago Office of Tourism estimates that the *Cows* generated an additional $100 to $200 million in revenue for area hoteliers, retailers, and restaurants. The project also raised an estimated $20 million for charities including Save the Children and the Special Olympics. No taxpayer dollars were used to support this project.

Christo's *Gates*: In just sixteen days, according to the office of New York Mayor Michael Bloomberg, Christo's *Gates* drew 4 million visitors and generated $254 million in tourist and related spending. Cultural and arts based festivals like Toronto's *Nuit Blanche* are huge revenue generators. During its first year (2006), the festival attracted 425,000 visitors and provided an economic impact of $1 million. In 2009, festival attendance grew to $1 million with an economic impact of $18 million.[5]

***WaterFire*, Providence, Rhode Island**: In 1994, artist Barnaby Evans was commissioned to create a one-time art installation to enliven the waterfront in Providence. The project proved so successful that it has become an annual, seasonal event drawing residents and visitors from across the world. Annually, *WaterFire* attracts more than 1 million visitors

and provides an estimated $45 million economic impact. *WaterFire* is a dynamic installation full of ceremony and drama. Huge braziers set up along the waterfront are lit Olympic style by runners (community volunteers) accompanied by a rousing original musical score. Fires are tended by more volunteers in gondolas. The night is ablaze with sparks that whirl through the air. *WaterFire* invites viewers to slow down and breathe, as it engages them through sight, sound, smell, and touch. The experience transforms the urban environment and the visitor's perception of it.[6]

Gathering Places

Millennium Park: In 2004, Chicago redefined itself by commissioning ambitious, signature architecture and art. Through such efforts Millennium Park was born. The 24.5-acre park is the result of a unique partnership between the City of Chicago and a broad philanthropic community. The park has attracted millions of people since its opening, making it one of Chicago's most popular must-see destinations. During its first year more than 2.5 million visited with an estimated economic impact $1.5 billion. In addition to the architecture of Frank Gehry, who designed the Jay Pritzker Pavilion, the park's public art is a huge draw, featuring the interactive *Crown Fountain* by Jaume Plensa and the crowd pleasing *Cloud Gate* by Anish Kapoor (the piece is popularly known as "*The Bean*").[7]

Destination Attractions

Olympic Sculpture Park: The blighted site of a former fuel storage and distribution facility that leached contaminated ground water into the Puget Sound has been transformed into a nine-acre, dynamic sculpture garden with unparalleled views of the Seattle waterfront and the Olympic Mountains. The collection includes work by some of the most important sculptors of our time: Louise Bourgeois, Claes Oldenberg, Richard Serra, Louise Nevelson, George Rickey, Tony Smith, and Beverly Pepper. During its two weeks in the dead of winter in January 2007, more than 90,000 visited the park. The project serves as a new, ambitious model for contemporary urban development.[8]

Questions to Consider

- As the 21st century emerges what art and cultural accomplishments will define Arizona?
- What will our cultural legacy be?
- Can we find a new model and funding mechanism to sustain investment in public art?

Edward Lebow has directed the Phoenix Public Art Program since 2005. Before joining the city's Office of Cultural Affairs, he was an award-winning journalist, covering government, politics, art, and design for a range of publications. As an investigative reporter for *Phoenix New Times*, he was awarded the 2001 John Kolbe Politics and Government Reporting Award by the Arizona Press Club and a 2000 first-place Unity Award by Lincoln University for political series writing. In 2004, as a reporter with the *Daily Press*, in Newport News, Virginia, he was among a team of reporters given a first place "features series award" by the Virginia Press Association for "No Easy Journey: 50 Years After Brown V. Board of Education," examining the impact that the Supreme Court's landmark decision had on Hampton Roads schools and communities. He recently contributed to the catalogue accompanying the national traveling exhibition, *A Chosen Path: The Ceramic Art of Karen Karnes*, which opened at the Arizona State University Museum of Art Ceramics Research Center in September 2010. Also in 2010, Lebow was elected to the Council of the Public Art Network (PAN is part of Americans for the Arts).

Valerie Vadala Homer serves as Director of the Scottsdale Public Art Program and is responsible for the administration and supervision of the city's Public Art Program and fine art collection. She served as the Interim Director of the Scottsdale Museum of Contemporary Art in 2001. Vadala Homer has worked for the Cultural Council since 1989, where prior to joining the visual arts staff, she served as the Assistant Development Director. Before joining the Cultural Council, Vadala Homer was a Faculty Associate in the English Department at Arizona State University where she taught writing. Her other work experience includes serving as a Technical Systems Administrator for America West Airlines; and management of a number of special educational projects for the Arizona State Department of Education based at Arizona State University, Phoenix College, and Phoenix Union High School. In 1995, Vadala Homer, along with artists Debra Hopkins and Mayme Kratz, was selected to create a permanent public artwork for Phoenix's Juniper Library. Titled *An Open Book*, in 1996, the project won a Valley Forward Merit Award for public art. Vadala Homer has authored several catalogs and essays including: *The Story of Love: The Life and Work of Robert Indiana* and *Path to the Innocent Eye: The Skyspaces of James Turrell*. Vadala Homer has also published numerous essays and poetry. She holds a B.A. in Political Science from Carroll College, in Helena, Montana, and a M.A. from Arizona State University in English Literature and an M.F.A. in Poetry. Vadala Homer lives with her husband and son in Scottsdale.

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1 Quoted in Edward Lebow, "Building Phoenix for the 21st Century," *Valley Guide Quarterly* (Fall 1996).

2 Neal R. Peirce led the team that wrote *The Peirce Report* on the civic-economic outlook of the Phoenix region, for the *Arizona Republic* and *Phoenix Gazette* (February 1987). See, Neal R. Peirce, "Valley has 'Grown Up' After 18 Years But Still Has Far to Go," *Arizona Republic* (1 May 2005): http://www.azcentral.com/arizonarepublic/viewpoints/articles/0501peirce0501.html.

3 For more information on this project, see the website: http://crochetcoralreef.org/.

4 Jack Becker, "Public Art's Cultural Evolution," *Community Arts Network Reading Room* (February 2002): http://www.communityarts.net/readingroom/archivefiles/2002/02/public_arts_cul.php.

5 See Nuit Blanche website: http://www.scotiabanknuitblanche.ca/home.shtml. An Impressive roster of artists participated: http://www.scotiabanknuitblanche.ca/artistIndex.aspx.

6 See Waterfire website: http://www.waterfire.org/.

7 See Millennium Park Website: http://www.millenniumpark.org/.

8 For more on the Olympic Sculpture Park, which is part of the Seattle Art Museum, see http://www.seattleartmuseum.org/visit/osp/.

Planes, Trains, and Public Art in the Valley of the Sun

Lennée Eller
Program Manager, Phoenix Airport Art Museum

M.B. Finnerty
Public Art Administrator, Metro Light Rail, Phoenix

Key Points

- Phoenix has one of the largest airport art museums in the nation
- For many visitors to Arizona, the airport art program creates a positive first impression of the state
- The airport's exhibitions and collections promote Arizona's unique artistic and cultural heritage
- The prominence of public art at the airport conveys a sense of place and generates community pride
- Public transit as a staple of urban renewal gained momentum at the same time as public art programs were established
- METRO Light Rail opened in 2008 and has art in all twenty-eight stations
- In enhancing urban areas, public art has contributed to an improved quality of life and livable, sustainable cities

Phoenix's "Artport" Museum: Artful Oasis in the Traveler's Desert

More than forty million passengers travel annually through Phoenix Sky Harbor International Airport, and first impressions of Arizona begin as soon as a visitor enters the terminal. The Phoenix airport relies on displayed artwork to fulfill a variety of purposes, meet goals, and even fulfill functions. One of the goals is to create a sense of place in our homogenized world that gives travelers, who may only be passing through, a real taste of Arizona. Travel author Pico Iyer succinctly says, "Airports say a lot about a place because they are both a city's business card and its handshake: they tell us what a community yearns to be as well as what it really is."[1] Airports are now part of the global community, making them a destination as well as a layover.

In the chaotic baggage claim area of Phoenix Sky Harbor International Airport, a little girl tightrope-walks on silver lines in the elegant inlay on the terrazzo floor. Under the watchful eyes of her parents, she spins on circles of blue and green and hop-scotches along the botanical designs. One parent watches for luggage while the other engages the child in searching for the silver butterflies and beetles set in the terrazzo around the carousel.[2] A frequent-flyer businessman, rolling his single carry-on bag, lingers in front of a display case filled with colorful and funky Arizona landscapes. Whipping out his Blackberry, he Googles

the artist's name, dials a number, makes contact, arranges to purchase the piece when the show comes down, and trundles off to his gate.[3] A harried mother hushes a cranky baby by pointing out the exquisite colors and fascinating shapes of Arizona "creepy crawlers" and asks the toddler to count the centipede's legs to see if there are really one hundred of them.[4] Writing in the gallery comment book, a visitor from Aurpan, Spain notes, "I like the idea of allowing Arizona artists to showcase their work here at the Airport. It also made my waiting time less boring and tedious and much more interesting."

Is there any public-transportation facility utilized as often or by as many people as a major airport? And no facility is more obligated to provide space that soothes jangled nerves, fosters a sense of community, and welcomes travelers with a culturally rich aesthetic. The City of Phoenix Aviation Department's Airport Museum has acknowledged this obligation and risen to the challenge to create what has become a point of pride for Arizona.

One of the largest airport art museums in the United States is located in the heart of Phoenix.[5] The Phoenix Airport Museum is not your garden-variety facility since its exhibitions are mounted in six buildings at three airports: Phoenix Sky Harbor International Airport (Terminals 2, 3, and 4, and the Rental Car Center), Phoenix Deer Valley Airport, and Phoenix Goodyear Airport. The museum includes a growing art collection of more than 550 works; it exhibits in twenty-five spaces and maintains the Phoenix Aviation Archive, as well. The Archive collects, preserves, interprets, and shares artifacts, documents, and memorabilia pertaining to the Phoenix airport communities to increase public awareness of important achievements in Phoenix aviation history, and items from the archive are often used for aviation history exhibitions. The City of Phoenix Aviation Department sponsors the museum and supports its mission of creating memorable environments that display Arizona's unique artistic and cultural heritage. The museum always strives to educate airport visitors about the artwork and objects on display, introduce Arizona artists, and promote the many galleries and museums in the region.

Collections

Art collecting in the Phoenix airport system began in the early 1960s with the constuction of Terminal 2. The 16' x 75' Paul Coze mural, *The Phoenix*, was selected by public vote and has become a City of Phoenix icon. Throughout the years, artworks were added through corporate donation until 1986, when the Phoenix Arts Commission and the Percent for Art ordinance were established. A year later the Aviation Department hired a curator to conserve and evaluate the airport's collection of twenty-eight major works and to plan for the addition of future public art. The largest structural capital improvement project to date—Terminal 4—opened three years later, and the determination was made that public art was required to create a sense of place and a point of pride in the community. Working together, the Phoenix Art Commission and the Aviation Department selected sixteen artists and commissioned over $2 million in artwork for the opening of the new terminal.

Today that entity, now known as the Phoenix Office of Cultural Affairs (POCA), continues to work in collaboration with the Phoenix Airport Museum to commission and purchase artwork for the collection, using one percent of construction monies or capital improvement funds. The selection and acquision of this artwork is managed by POCA. Museum staff

is responsible for managing, maintaining, and exhibiting the collection, and overseeing the safe transport and storage of artwork. Today, the collection includes a wide variety of items—large murals and sculptures, integrated architectural work, and studio works, both two and three-dimensional.

The Airport's collection has a strong focus on contemporary Arizona ceramics that include both functional and sculptural pieces in a wide variety of styles—realist, naturalist, expressionist, surrealistic, and non-objective with Japanese, European, Latin American, Native American, satiric, comedic, and primitive-folk influences. The medium of ceramics was a natural focus for the airport collection for two reasons: first, its relevance to the region and second, its durability. The Southwest has one of the oldest, most complex, and continuous ceramic traditions in the United States. Because of widespread acquaintance with and appreciation of Native American ceramics, southwesterners are especially receptive to contemporary ceramics. Arizona's three universities are recognized as important national ceramic centers, and its museums and art institutions hold large collections of historical and contemporary work in this medium. Artwork on constant public view is subject to negative environmental conditions: ultraviolet light, temperature and humidity changes, dust, and dirt. Most of the ceramics in the museum collection tolerate these conservation concerns and require very little maintenance.

For years artists themselves have been an integral part of the continuous renovation and construction projects at the airport. Artists, architects, and arts administrators all work together to bring projects to a cohesive conclusion. Currently seven artists are working to enhance the new PHX SkyTrain under construction by designing functional aspects of the 44th Street Station, the East Economy Station, and the Terminal 4 platform and connecting bridges. Artists are using their talents to ornament flooring, wall surfaces, and ceilings in order to create an overall aesthetic that engages travelers.

Exhibitions

In July 1988, a very small exhibition in Terminal 3 was the precursor for what today is one of the largest airport exhibition programs in the nation. That unlikely first exhibition of tooth-themed artwork and artifact, *Dental Impressions*, sprang from a request to show student artwork promoting dental sealants. The exhibition included contemporary sculpture from local artists, a dental chair from the Arizona Historical Museum, obsolete dental tools from private collectors, and dental history and trivia—and was extremely well received by airport travelers. Over the years, the numbers of exhibition and exhibit spaces at the airport have grown enormously, but exhibitions continue the tradition of being curated to appeal to a broad audience and focusing on Arizona's unique artistic and cultural heritage.

The Airport Museum staff collaborates with artists, collectors, and museums to display existing exhibitions or to create new ones. The exhibits may also consist solely or in part of portable artwork from the airport's own collection. In addition to artwork, exhibition themes may include aviation history or natural-history. Sometimes the "art" may be jewel-like miniature engines, bizarre and beautiful bugs, or elaborate operatic costumes.

Most of the thematically curated exhibitions are on display for up to six months. There are no permanent displays since temporary exhibits keep the frequent traveler engaged. Exhibit cases are spread throughout the terminals in areas with the most public access. The Airport Museum curators make a concerted effort to have all exhibits reflect Arizona's cultural community, be eclectic in style and medium, and present diverse subject matter. The airport program is dedicated to providing opportunities to all Arizona artists through open competition, and museums statewide are regularly offered an opportunity to enhance programming and self-promotion by exhibiting their collections at the airport.

The Arts-in-Airport movement has blossomed over the last twenty years in that most major airport hubs and even mid-size destination airports now have strong programs and enjoy community support and enhanced public awareness. The American Association of Airport Executives (AAAE) sponsors an annual Arts in Airport Workshop to continue development in this unique and exciting field. Airport directors now understand that airport terminals are not merely functional spaces for processing passengers, but also that members of the flying public have become savvy air travelers with high expectations for attractive, as well as functional facilities, and excelling services.

The Phoenix Airport Museum has been progressive in its approach to art in the airport in both its Public Art collection and in exhibition programming. It is a compliment and distinction that the Museum program has been the prototype used by administrators from more than fifty airports in the United States as they have established art programming, set policy, maintained collections, designed and constructed exhibit spaces, and developed a mission statement for their own facilities. Growing the arts at the Phoenix Airport Museum remains a priority for the airport administration and the museum staff—continuing to demonstrate pride in Arizona's beauty, culture, and artists.

Light Rail as a Work of Art

In October 2008, just months before the official opening of the Central Phoenix/East Valley Light Rail Extension, METRO hosted a celebration of the light rail's public art program.[6] The event acknowledged the hundreds of volunteers, contractors, staff, designers, and artists who had worked on one of Arizona's largest public art projects. Significantly, despite the various battles fought along the way for the light rail itself, the art program was mainly seen as the latest in a rich tradition of valley-wide urban design.

Four years earlier, Maricopa County residents were still debating if public transit would really move forward. Proposition 400 was a contentious bill for a twenty-year extension of a half-cent sales tax to support freeways, buses, and light rail, as well as pedestrian routes and bikeways. Funding for the Central Phoenix/East Valley line was assured, but the future of light rail hung in the balance. Perhaps the loudest anti-rail argument was that the Valley of the Sun was a car culture. The suburban and desert sprawl between communities, between work and home, shopping and business was too great, the desert climate too extreme. People would never give up the convenience of their air-conditioned automobiles.

Six years later, light rail's success, measured by ridership figures far in excess of expectations, came as a surprise to many people. To others, the system's success, measured not only in ridership, but also in a renewed vitality experienced throughout the area, was just a continuation of an urban design movement. This included public art and transit, which had been around for a long time and was finally coming into its own.

Smart urban design, with its goals of creating livable, sustainable cities, is hardly a new concept to the area. The light rail, in its earliest incarnation—the trolley—was actually introduced in Phoenix as early as 1893.[7] The trolley brought transit to the burgeoning valley, and it also spurred development around the new alignment, defining the downtown corridor as well as eventually connecting different areas of the future city.

Like other systems nation-wide, public transit fell victim to the popularity of the automobile. Urban areas gave way to suburban sprawl and highways became the norm.

In the late 1970's, despite the growth of the automobile and the decline in American public transportation, there was resurgence in transit investment. In 1981, the first American light rail system made its debut in San Diego.[8] Dozens of new systems soon followed throughout the country.

At the same time that transit was becoming a staple of urban renewal, public art, another component of urban design, was also gaining momentum. Publicly funded art as part of the infrastructure led to the redesign and beautification of public areas: city plazas, parks, streets, buildings, civic spaces, and all modes of public transportation.

The federal government has, to varying degrees, been supportive of this movement, particularly in light rail. In its 1988 Urban Mass Transit Act, they encouraged artists to be involved in the design, without officially funding any art. In Portland, Oregon, the Tri-Met system included artists as "designers," but it wasn't until after 1995, when Federal Transit Administration (FTA) policy promoted public artwork as an integral part of transit projects, that artists were able to design and create "art."[9]

In line with the national trend, Phoenix and its surrounding cities, Tempe, Mesa, and Glendale (partner cities for the original light rail alignment), were adopting percent for art ordinances and resolutions. These created a steady funding source for public art from all new capital improvement projects, and public art became integral to revitalizing the city core, getting people out of their cars and into communal areas. Transit and public art were regularly paired together—successful examples include the Sunnyslope Canal Demonstration Project, the Papago Salado Loop, and the Marina Water Muse. Countless numbers of enhanced bus stops, trails, freeway bridges—all aimed at bringing a human scale back to the community and mitigating, the sterile, hot, inhuman environment of the ever-multiplying lanes of roadway. When the light rail capital improvement project was introduced, with its $1.4 billion budget for the Central Phoenix/East Valley extension, the cities' percent for art programs were ready.

Furthermore, the sensible approach of including the artists in at the beginning of the project was also embraced. METRO hired an art consultant initially to draft an art program plan and then hired Tad Savinar, a veteran of dozens of light rail projects, and a planning and transit enthusiast as well, to help implement it. Savinar worked with Betsy Moll, the architectural manager, to form a citizens' commission which would create a set of priorities to guide the station architecture as well as the art program. These Urban Design Guidelines were constantly referred to throughout the process; they were the communities' wish list. The cities also agreed on one public art manager to administer the entire regional project.

In addition, the Regional Rail Arts Committee (RRAC), made up of community artists and arts professionals, was created to oversee the program. Not only did they monitor it, but they were involved from start to finish in the aesthetic product. They served as critics, sounding boards, and as the last wall of defense against any threats to the principles of the program. The RRAC's effort was truly laudable, and its members endured multiple meetings lasting for hours.

Five Design Team Artists, selected by the RRAC, teamed with the five architectural firms in a competition to create the station designs. The goal was to provide shelter from the extreme desert climate, a safe refuge to await the train, and a design adaptable to different neighborhoods and locales—the first three principles demanded by the Urban Design Guidelines. A sixth Design Team Artist was paired with the Tempe Town Lake Bridge engineer.

When the station artists came on board, they also worked with the stakeholders and the RRAC to gain an understanding of the neighborhood character at each station. The artists all worked within the context of their station, but the approach to each work was unique. With twenty-eight stations, the diversity of artwork is truly astounding.

Some artists created work that spoke to the history of the area, including Mary Lucking's Indian School station, Steve Farley's Central/Washington—1st/Jefferson station, and Victor Zaballa's 12th Street stations. These artists researched the area, conducting interviews and delving into public and personal archives to find photographs, maps, and stories that could highlight the people and events of each community.

Artworks that related to the institutions and landmarks around them, included Michael Maglich's piece which is a dialogue between the Phoenix Art Museum, the Burton Barr Central Library, and the historic neighborhoods that flank the McDowell station. Jamex and Einar de la Torre's multi-cultural Pre-Columbian and Southwest Native American imagery are reflections of exhibits found in the Heard Museum.

At the 38th Street station, Michael Machnic and Stuart Keeler created a solar calendar with an aerospace industry aesthetic reflecting the nearby expanding airport and the student programs of Gateway Community College to the north. Students at Central High School, across from the Central and Campbell station inspired Al Price, a former high school math teacher, to create a hyperbolic parabola sculpture based on the geometry of the stations' tensile shade canopies. In Tempe, Bill Will and Norie Sato's station at Rural and University celebrates the amazing size and diversity of collections found on the Arizona State University campus while reflecting the institution's spirit of wonder and learning.

Some of the artworks are massive in scale, challenging the tiny size of the station platform. Ilan Averbuch, the line section two design team artist, selected the Central and Camelback station's small triangular plaza to place his eighteen-foot-tall granite ring transected by marching vertical steel figures. And Suikang Zhao's twenty-one-foot high bronze hands defy all logic for a narrow entryway at Dorsey and Apache. Passengers marvel at the sheer size every time they walk beneath the fingertip arch to reach the platform.

The artist teams brought in color and light, detail and wonder to each of the twenty-eight stations. Despite initial attempts at a cohesive theme connecting works in each line section, the real unity of the alignment is the architectural kit of parts that allows the artwork to be unique at each station and to address the riders in different ways.

The distinctive artwork at each station is as important as the overall identity of the station architecture. The artwork signals a level of care and personalization—that the passengers are important, that the neighborhoods are important, that the living and working environments are important. If the stations were merely utilitarian, badly designed, or just plain uninteresting, there would still be riders on the train—light rail is now integral to how people get around in the cities—but would it be as popular as it is? Would it be spoken of with such pride and affection? Would there be blogs about it and tours of it and bands playing music on it? Like the public art enhancing the urban areas around the tracks, the light rail public art program is just one more element directed at improving the quality of life.

The artwork on the Central Phoenix/East Valley alignment has been recognized by the Americans for the Arts Year in Review. The bridge has won several awards, and the Federal Transit Administration has cited METRO as a model of successful light rail art programs.[10]

One of the positive developments regarding the light rail's art program was that there was no substantial struggle to have it included. No epic battles raged about the fundamental necessity of art as part of a civic space. It wasn't that public art program didn't have its detractors. There will always be those complaining that art money could be better spent on "practical" matters and wondering why their tax dollars support art they don't like. Those voices were always there, but there were overwhelming forces supporting the art—strong leadership from the design and management teams, and strong agreement from METRO's partner cities and the understanding of stakeholders that public art is part of a vital city.

The Valley of the Sun has traditionally been defined as a place whose population loves the open road. People who moved West did so for the freedom that comes from car culture. But as urban design replaces urban sprawl, we increasingly redefine our priorities in terms of livable and sustainable communities. We can look back to a not so distant past when transit was an integral part of community building. The trolley and bus system, the recreational use of the canal system, and all of our parks and pathways show that accessible, human scaled places were important to us then and are important to us again. Public art has been embraced in the valley, reflecting our richly varied history, but it also has taken a leadership role in creating a livable environment. Art on the light rail is the latest example of a strong and vibrant tradition of creating livable, identifiable, spaces that reflect our culture and values while exploring our future.

Lennée Eller is Program Manager at the Phoenix Airport Art Museum. Eller established and has managed the Phoenix Airports Museum Program since 1987. She was hired to conserve and evaluate the airport's collection of 28 major works and to plan for the addition of public art in conjunction the Phoenix Office of Cultural Affairs, Percent for Art Program. In 1989, she established changing exhibitions at Sky Harbor, showcasing museums, galleries, and local artists. Obtaining a B.F.A. degree in 1979 from Arizona State University (ASU), she interned at ASU Art Museum, and took classes in museology. From 1984 to 1986, she was Executive Director of the non-profit organization, Moviemento Del Rio Salado (MARS) Art Space in downtown Phoenix. Active in the museum community, Lennée is a member of the Central Arizona Museum Association (CAMA); the Museum Association of Arizona (MAA), the Western Museums Association (WMA), the American Association of Museums (AAM), the National Association for Museum Exhibitors (NAME), and the Americans for the Arts (AFTA). She has been a member of ArtTable since 2004, a national, invitation-only organization for professional women in leadership positions in the visual arts. Lennée is a visual artist and exhibits her artwork in the Phoenix area. Her artwork, sculpture, screen prints, drawings, and paintings, are in private and municipal collections, both national and international.

M.B. Finnerty was raised in Phoenix, received her B.A. in art history from the University of Arizona and her M.A. in art history from the University of Texas, at Austin. She worked in the City of Mesa's arts division and public art department shortly before joining METRO as their public art administrator. She is a member of the Americans for the Arts (AFTA) and currently serves as vice-chair of the City of Glendale Arts Commission.

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1 Pico Iyer, *Global Soul: Jet Lag, Shopping Malls, and the Search for Home* (New York: Alfred A. Knopf, 2000): 41-77.

2 Artist Teresa Villegas, terrazzo floor design completed in 2010, Public Art project managed through the Phoenix Office of Cultural Affairs

3 Temporary Exhibition: *Driven to Paint: Arizona Landscapes* by Mark Zillman, April 24-October 17, 2010, Terminal 2 Security Check Point area

4 Exhibition: *Arizona Bizarre and Beautiful Bugs*, from the permanent Collection, exhibits throughout various locations in the terminals.

5 For more information on the airport art program, see their website: http://skyharbor.com/community/artMuseum.html. The Tucson International Airport Arts and Culture Program oversees a permanent collection, sponsors changing exhibitions, as well as "Live at the TIA!", a performing arts program. Smaller than that at Sky Harbor, Tucson's does not have a public art program.

6 See, Metro Public Art: http://www.valleymetro.org/metro_light_rail/metro_public_art/. There is information on the art works at all 28 stations. For planned extensions, see: http://www.valleymetro.org/metro_light_rail/future_extensions/mesa/.

7 Jana Bommersbach, "The Little Trolley that Could," *Phoenix Magazine*, May, 2008.

8 See, Gregory L. Thompson, *Defining an Alternative Future: Birth of the Light Rail Movement in North America, Planning and Forecasting for Light Rail Transit*. Transportation Research Circular E-C058: 9th National Light Rail Transit Conference (16-18 November 2003, Portland, Oregon):http://onlinepubs.trb.org/onlinepubs/circulars/ec058/03_01_Thompson.pdf.

9 See also, "Light Rail," Wikipedia: http://en.wikipedia.org/wiki/Light_rail. There is a Light Rail Transit Association: http://www.lrta.org/. Other cities with ambitious light rail/art programs that served as models for Valley Metro include Portland (Oregon), Seattle, Salt Lake City, Minneapolis, Los Angeles, San Diego, Denver, and New York City.

10 Rebecca Banyas, "Transit Landscape," *Public Art Review*, Spring Summer, 2002. The Federal Transit Administration's website has highlighted "Valley Metro's METRO Public Art":http://www.fta.dot.gov/publications/reports/other_reports/about_FTA_10988.html.

Play On:
The Performing Arts

Cathy Weiss
Executive Director, Del E. Webb Center for the Performing Arts, Wickenburg

Key Points

- Competition for the leisure dollar between fine and mainstream arts is fierce
- Live Nation concerts can give the public unrealistic expectations for their local performing arts center
- Subscription sales nationwide (including Arizona) have stalled
- A typical American receives 3,000-5,000 marketing messages a day
- There is no safety net for presenting new, young, culturally significant performances
- Technology has changed our entire society, and resulting in a realignment of cultural expression and communication
- The economic downturn has forced presenting organizations in Arizona to make significant cutbacks in staffing and expenses

Definitions

Performing Arts:
What is presented in front of an audience at an event. Traditional forms of the performing arts include music, dance, and theatre, referred to as the "fine" arts.

Fine Arts:
Art created for purely aesthetic expression, communication, or contemplation, something requiring highly developed technical skills.

Presenter:
Performing arts presenters are individuals/organizations that work to facilitate exchanges between artists and audiences through creative, educational, and performance opportunities. The job of an Arts Presenter is to bring audiences and artists together.

Mainstream Arts:
Art for the masses. Motion pictures, broadcasting, cable, rock and pop concerts are considered mainstream arts.

Promoter:
Tour promoters (also known as concert promoters or talent buyers) are the individuals or companies responsible for organizing a live concert tour or special event performance. Promoters typically work with mainstream artists.

The Performing Arts Presenter

The organizations that present performing arts are either for-profit or non-profit. There are two different approaches in presenting; one is commercial in nature and the other is curatorial. The commercial approach is more public-centric and economically driven, while the curatorial approach tends to emphasize content, artistic quality, and an artist's career trajectory regardless of broad appeal. The curatorial approach tends to foster long-term relationships with the audience and the artists.

Generally there are four different types of presenters in the United States:

- Independent arts centers and spaces
- University presenters
- Community-based organizations
- Festivals and event-specific presenters

There are many kinds of presenters; from small volunteer-run groups, to mid-sized organizations, to multi-million dollar institutions. No matter the size, venue, or genre, all presenting organizations share the intention of making their community a culturally richer place to live with diverse arts experiences and opportunities.

Three examples of all-volunteer organizations in the state of Arizona include:

- The Fountain Hills In-Home Concert Series, presenting professional jazz and classical music in private homes for fifteen years.
- Arizona Friends of Chamber Music in Tucson, offering an evening series featuring chamber music ensembles for the past sixty years. In 1994 they created the week long Tucson Winter Chamber Music Festival held each March. In 1995 they added the Piano and Friends series.
- In Wickenburg, the Friends of Music, presenting live music concerts free to the public for over sixty years.

Mid-sized organizations (based on budget or venue capacity) across the state include:

- The Queen Creek Performing Arts Center presents family and community performances.
- The Musical Instrument Museum (MIM) Music Theatre in Phoenix, focuses on traditional, contemporary, instrumental, and vocal music from around the world.
- The Del E. Webb Center for the Performing Arts in Wickenburg presents professional touring artists in a wide array of genres, and in 2009 added a live/workspace for artists, "The Flying E Ranch Residency Project."

Large presenting organizations in Arizona include:

- The Scottsdale Center for the Arts under the auspices of the Scottsdale
- Cultural Council.
- In Tucson, the University of Arizona, UAPresents, presents world-class music, dance, and theatre in Southern Arizona.
- In Tempe, Arizona State University ASU Gammage serves as the home theatre for the Broadway Across America and is among the largest university-based presenters of performing arts in the world.

The Promoter

Live Nation Entertainment is the largest promoter worldwide. In 2009, Live Nation sold 140 million tickets, promoted 21,000 concerts, and partnered with 850 sponsors.[1] Their business is promoting "mainstream" artists for profit. Today's mainstream artists include; Lady Gaga, Rascal Flatts, and Justin Bieber, to name a very few.

Live Nation makes its money on ancillary revenues—ticket fees, concessions, parking, merchandise, premium seating, and the like. Ticket prices are known to exceed $100, and up to $1,000 for VIP seating.

Venues used in Arizona include the U.S. Airways Arena, Orpheum Theatre, Jobing.com Arena, Tucson Arena, Cricket Wireless Pavilion, and smaller venues including the Rhythm Room.

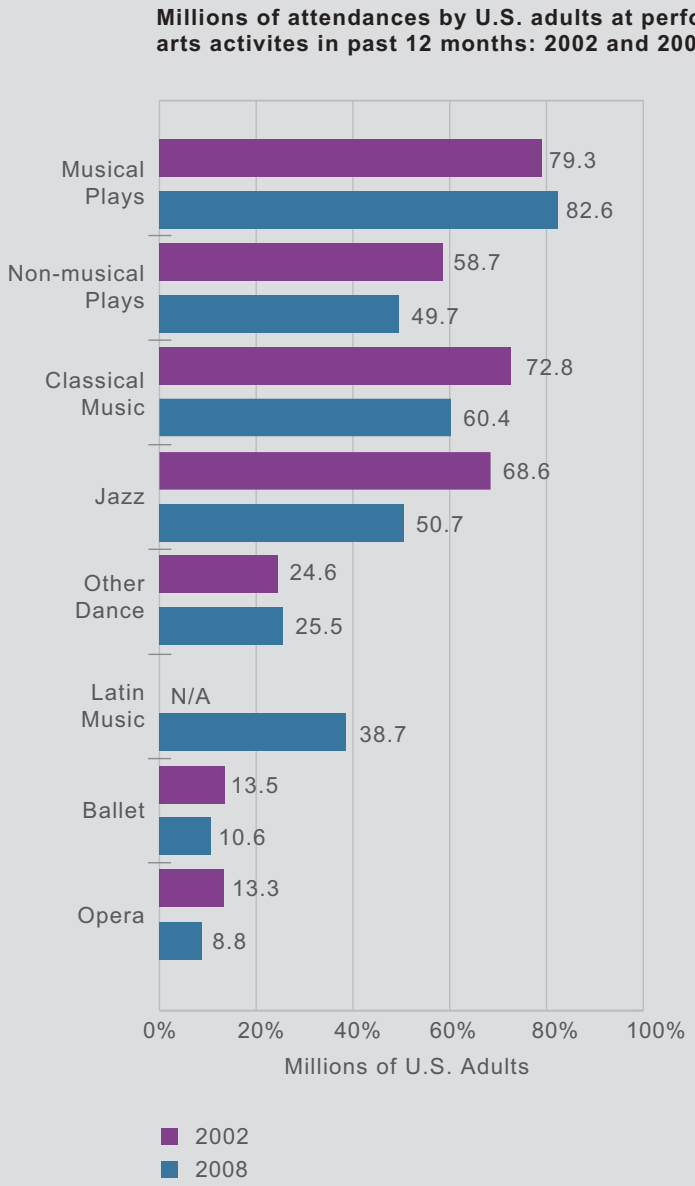
Presenter vs. Promoter

Each performing art form has a purpose and bears further explanation since the competition between fine and mainstream arts are both vying for the same audience and leisure dollar. Performing arts presenters cannot compete on any level with promoters such as Live Nation. However, the general public has no understanding of the difference between a presenter and a promoter; nor should they. Yet Live Nation concerts shape our culture, and leave the public with unrealistic expectations for their local performing arts center. It is safe to say that each day in an art presenters' career, a community member will state, "You should get Bon Jovi!"

Participation Facts

In 2009 the National Endowment for the Arts published a survey of "Public Participation in the Arts" and compared results from 2002 to 2008.[2]

Table 19.1



Credit: 2008 Survey of Public Participation in the Arts

In 2008, there were more attendees of musical plays—83 million—higher than any other type of performing arts genre studied. Attendances for musical plays saw little change from 2002 to 2008, which was also true for the number of attendances at "other dance" performances.

Attendance at all other types of performing arts events studied in both 2002 and 2008 had large declines in 2008, as illustrated in Table 19.1. Attendance decreased by anywhere from 15-26% for jazz, classical music concerts, non-musical plays, and ballet. On a percentage basis, opera saw the largest decline in attendance from 2002 to 2008 at 33.8%. Total attendance for Latin music performances—measured for the first time in 2008—was approximately 39 million.

The Series

To build audience participation, presenting organizations program a series of performing arts; multiple performances based around their mission. Whether it is six chamber music performances, five theatre productions, or twenty performances in multiple genres, a series is designed to attract the same audience members to several different performances. It is the old adage "one in the hand…"

Once a patron purchases a ticket for a performance, they have identified themselves as someone who has a propensity for the performing arts. It is much less expensive to market other performances to that individual with a higher rate of return than to a person with unknown interests. Presenting organizations offer discounts for returning patrons in the hope of building trust. Trusting the artistic choices of a presenting organization is paramount when building an audience relationship or patron loyalty.

Patron loyalty begets long term relationships. Audience members who purchase five, ten, or fifteen tickets to performances in a season—known as subscription sales—form the base of a presenter's ticket sales.

Subscription sales at many venues in Arizona and across the nation have stalled. New gains seem to equal losses, but stalled none-the-less. Is there a loss of loyalty or has our world changed?

The Shift

Post 9/11, there was a collapse of social planning. Seemingly overnight audiences shifted from committing and purchasing tickets two to four weeks before a performance, to purchasing on the day of, or, twenty-four to forty-eight hours in advance of a show.

We are a populace characterized by over-scheduling and exhaustion. This is a time in which 42% of men and 55% of women say they are too tired to do the things they truly want to do. For them, the number one answer to the question of "most eagerly anticipated use of a free evening" is no longer dinner with friends or a movie or a performing arts event, but is instead "a good night's sleep."[3]

Single Ticket Sales

This shift pushed the single ticket buyer to the forefront. Individuals who purchase single tickets (tickets to one event) are expensive and difficult to reach for a presenter with a limited marketing budget.

Trying to attract the attention of potential ticket buyers, arts organizations now compete with between 3,000-5,000 different marketing messages a typical American sees every single day.[4]

In addition, the single ticket buyer can be fickle. With intentions of purchasing a ticket at the door, single ticket buyers can be easily swayed by a rough day at the office, an irritable child, or inconvenient weather.

Such a buying pattern and indecisiveness will undoubtedly affect programming. Without a strong subscription base, there is no safety net to present new, young, culturally significant performances. Programming has become more conservative.

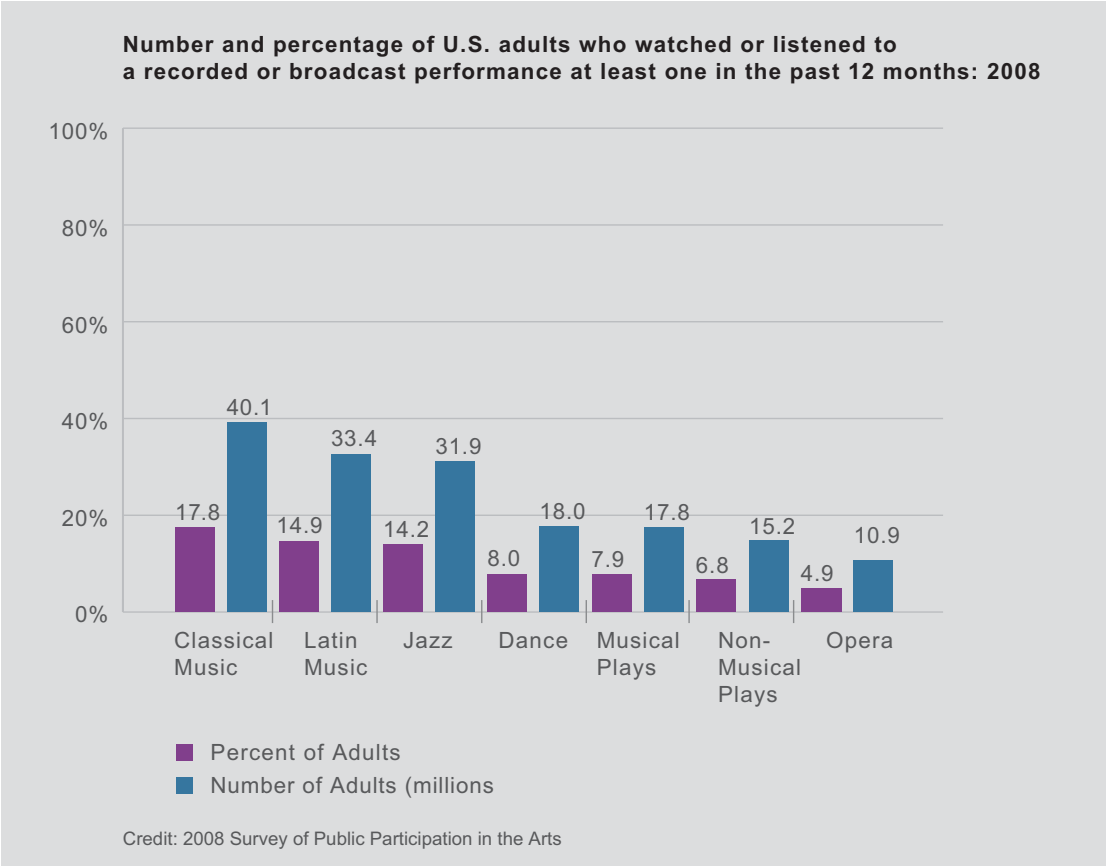
Technology and the Performing Arts

Technology has changed our entire society. We can shop anytime day or night, Google is now a verb not a proper noun, and we can communicate with anyone in the world in an instant. It is reported that in 2007 computer games outsold movies and music recordings combined.

In a recent speech, Ben Cameron, Arts Program Director at the Doris Duke Charitable Foundation in New York, noted the struggle to understand more fully the impact of technology on the live performing arts:

> In an age where young people especially access culture on demand through YouTube and iTunes any time they want it and for little or no apparent cost, what will it mean in the future when we ask a potential audience member to pay $100 for a symphony, opera or dance ticket, when that consumer has been accustomed to downloading on the internet for .99 a song or for free?
>
> We are essentially in the midst of a realignment of cultural expression and communication.[5]

Table 19.2



Performances in venues are on set days and times. Attending an event usually requires some planning and cannot compete with "on demand."

Yet people come to venues to see and be seen, and here is a social context involved. Season ticket patrons sit next to each other and build relationships. Meeting and making friends at an arts event constitutes the same social capital as that of a sporting event.

Electronic Media & the Arts

In 2008, about five percent of adults say they watch or listen to opera via recorded or broadcast media. For jazz and Latin music, the media participation rate is substantially higher—about fifteen percent of all adults, for each type of music—and for classical music it is eighteen percent.

Adult audiences for recorded or broadcast media in 2008 ranged from eleven million for opera to forty million for classical music, as illustrated in Table 19.2. The total audience participating through these media is more than double the number of Americans going to live performances.[6]

Building Bridges

If more than half of Americans participate in the recorded or broadcast media of fine performing arts than attend a live performance, then how can arts organizations widen their reach?

The Metropolitan Opera in New York did not stand by and watch their audience decline. They took action. On September 7, 2006, the headline in the Arts Section of the *New York Times* read: "The Multiplex as Opera House: Will They Serve Popcorn?" In an excerpt from that article Metropolitan Opera officials describe their broadcasting strategy.

> The Metropolitan Opera announced yesterday that it would begin broadcasting live performances into movie theaters across the United States, Canada and Europe, rubbing shoulders with professional wrestling and rock concerts.
>
> The broadcasts are part of a strategy by the Met's new general manager, Peter Gelb, to widen the house's appeal by branching out into new media. "I think what I'm doing is exactly what the Met engaged me to do, which is build bridges to a broader public," Mr. Gelb said.

Five seasons later the Metropolitan Opera is reaching audiences worldwide with their broadcasts. They offer a new online subscription streaming service with more than 300 full length operas available on command. Sirius XM offers listeners three live performances from the Metropolitan stage each week.

The new Musical Instrument Museum Music Theatre in Phoenix was built with live streaming in mind. Other venues across the state are adding the feature.

Nothing replaces the exhilaration of a live performance but perhaps technology can open up more doors in the performing arts field.

Collaboration and the Arizona Presenters Alliance

Serving presenters is The Arizona Presenters Alliance (APA), a state wide professional service organization that is committed to communication, professional growth, development, leadership, and advocacy for the presentation of arts in Arizona. Through this organization and collaborative relationships, Arizona presenters work together to bring artists and artistic companies to their venues.

Several presenters partner to bring artists to Arizona that would normally be beyond their individual financial capacity. Block booking with several venues allows the artist to reduce their overhead travel expenses, thereby reducing the fees to the presenter. The end result is quality artists with reduced ticket prices for Arizona audiences.

Human Capital and Fragile Infrastructure

It is well known that the majority of fine performing artists are severely under-resourced. Time, space, and money are scarce. Small and large institutions struggle equally to give professional performances on limited budgets.

Rehearsal time for The Phoenix Symphony is precious. Typically when the symphony rehearses a new classical piece they must be performance ready in four rehearsals. Pops concerts garner only one rehearsal. Ib Anderson, the Artistic Director at Ballet Arizona, has committed his organization to presenting dance with live music. The dancers have two rehearsals with the live orchestra, one of which is the dress rehearsal.

Artists, technicians, and administrators are seldom paid a living wage; certainly not one commensurate with their experience or talent. Many work multiple jobs to support themselves and their families. Health Insurance and benefits are a luxury.

Many independent artists struggle to find an agent or manager to represent them. The agent fees are too high or their roster is already so full, they do not have time to properly represent another artist.

To adapt to the downturn in the economy, presenting organizations in Arizona and all over the country have made significant cutbacks in staffing and expenses. In a field that is generally comprised of financially conservative leaders, these cutbacks have left most organizations without depth. Staff numbers are small, each playing many roles and when one person leaves the organization or becomes ill, there is no understudy or back-up staff member. The importance of human capital must not be overlooked.

Technical Directors, sound engineers, stagehands, fly operators, etc., are highly skilled individuals and a critical component to the live part of the performing arts. Without the

technical crew, even the most beautiful venue in the world is simply one large, dark, quiet space. Lacking appropriate financial resources, the performing arts industry has stretched its human resources as a means of best accomplishing their programming. The result is the public gets exceptionally high-quality presentations without any understanding of what that performance art actually costs. The infrastructures of these organizations are fragile at best.

Arizona's Artistic Community

The performing arts community in Arizona remains dedicated. Promoters, presenters, and companies work diligently to create quality performances and events. Arts presenters take pride in providing fair compensation to performing artists and are held in high regard in the industry. Touring artists performing in the state are welcomed by Arizona hospitality and appreciative audiences. Local artists are revered for their talents; whether preserving our state heritage, entertaining audiences, or educating children. Artists find respect in Arizona, and more often than not—a standing ovation.

Cathy Weiss, Executive Director of the Del E. Webb Center for the Performing Arts in Wickenburg, leads a non-profit organization dedicated to presenting world class performing arts in a 600-seat, state-of-the-art theatre while providing free arts education experiences in classrooms, and through after school and extended residency programs for the 2,100 children in this rural area of Arizona. In addition, the Webb Center produces an arts summer camp for 120 children each June. The Webb Center provides a life long learning arts series for adults throughout the year. Cathy is also the curator for the Flying E Guest Ranch Project that provides a tranquil artist/live workspace for performing artistic companies from all over the world to create new work to add to their repertoire. Prior to joining the Webb Center team, Cathy enjoyed a 27-year career in the luxury hotel business. She is married to Rui Pereira, the General Manager of Rancho de los Caballeros who serves as a member of the Wickenburg Town Council.

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1 Live Nation: http://www.livenation.com/h/about_us.html

2 nea.gov/research/2008-SPPA.pdf.

3 Ben Cameron, Arts Program Director, Doris Duke Charitable Foundation, "How Technology Is Transforming & Challenging The Live Performing Arts," 15 September 2010: http://www.hypebot.com/hypebot/2010/09/how-technology-is-transforming-challenging-the-live-performing-arts-ben-cameron-speaks-at-ted.html

4 Ibid.

5 Ibid.

6 nea.gov/research/2008-SPPA.pdf .

To Keep Them Coming: Audience Development in an Age of Competing Attractions and Changing Community

Richard Toon
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Key Points

- Arts and cultural organizations face challenges maintaining current audiences and attracting new ones
- The number of "high culture" arts organizations has been growing while demand for them has not
- New technologies compete for people's leisure time, while enabling greater access and interactive participation in culture
- With the Internet, the cultural supermarket has grown increasingly diverse, experimental, and sophisticated
- In addition to concerts, theatre, and museums, many also define cultural activity as sports, expos, and religious functions
- Changing demographics and the economic downturn suggest new strategies for attracting new audiences
- Public art relocates the sites of art and culture

This short chapter outlines key challenges facing arts and cultural organizations in Arizona. Some arise from the increasingly crowded marketplace of leisure time activities and others from changes in Arizona's population and economy. But in these challenges lie opportunities, some of which are sketched here and some posed as questions for further discussion.

New Audiences for New Media

How can arts and cultural institutions maintain the followings they have and reach out and attract new audiences? That's the question daunting anyone in the business of promoting the arts, particularly that sector that used to be thought of as "high culture"— museums, theatres, dance companies, opera companies, and symphony orchestras, among others. Nationally, the number of such arts organizations has been growing while demand for them has not.[1] One of the main reasons for this, researchers have found, is increasingly crowded competition for people's leisure time by new technologies—principally the Internet and downloadable, virtual content—and the new ways these technologies enable people to access and interactively participate in culture. The upshot is fewer and fewer people regularly go

out to experience "benchmark" art forms (jazz, classical music, opera, musical theatre, ballet, theatre, and the visual arts). Bad news for bricks-and-mortar venues, but not necessarily a blow to the art forms themselves, since people are enjoying them in different ways.

What may appear the greatest challenge to culture consumption offers methods for addressing the slump in attendance. Increasingly, people don't watch TV when it's broadcast but rather click on online sites such as Hulu to see shows when they want. Not only that, Hulu and other providers offer videos depicting backstage life and interviews with writers and producers about how shows are made. The "extras" and "special features" we've come to enjoy on DVDs and websites are clues to what people increasingly desire, which isn't less culture but a more intimate relationship to it. These are people, after all, savvy about making their own videos and posting them on Facebook, YouTube, and Vimeo. The line between the amateur and professional artist grows blurrier all the time, and although sometimes the outcome produces a "dumbing down" of what people consume, more often—because people can select what they want to see on the Internet—the cultural supermarket is growing increasingly diverse, experimental, and sophisticated. The cultural mall rat, too, grows increasingly knowing, exposed, and culturally omnivorous across old high and popular cultural boundaries.

How Arizonans Spend Their Time

In addition to all this, Arizona arts organizations are up against their own set of challenges. In 2008, the Morrison Institute for Public Policy conducted a survey to determine how people in the state spend their time, including engaged with art and culture, and the participants, drawn from a representative sample, were allowed to determine what they meant by these concepts.[2] Of the 651 Arizonans questioned, 45% said they regularly attended at least one type of cultural event, but one of the survey's intriguing findings is the list of cultural activities included professional or college sports, expos and conventions, and religious functions. Fifty-five percent didn't count themselves regular attendees of *any* arts and cultural events, which may be tough news for arts organizations at present, but a boon for anyone wishing to cultivate new audiences.

Table 20.1: Arizona Attendance at Cultural Events

Regularly Attend	All respondents	Those who attend at least one event
Concerts	29%	64%
Festivals	21%	46%
Theatre & plays	16%	36%
Museums & Galleries	9%	21%
Some other	9%	19%
Professional or college sports	7%	15%
Expos/conventions	3%	6%
Religious	2%	5%
Movies	2%	5%

n All=651, At least one activity regularly=295 Source: Morrison Institute for Public Policy

Also promising, among those who regularly attend cultural activities, there was considerable overlap in the most popular kinds of venues they mentioned—that is, concerts, cultural festivals, museums and galleries, and theatre and plays. You can think of this as a "high culture" cluster, and in efforts to reach them arts organizations have considerable potential for collaboration, rather than to see themselves in competition with each other.

Table 20.2: Type of Cultural Event Attended

Type of art & culture event		Festivals	Theatre & Plays	Museums & galleries
Concerts[3]	Column %	44%	66%	61%
	Row %	34%	37%	20%
Festivals	Column %		36%	36%
	Row %		37%	16%
Theatre & plays	Column %			31%
	Row %			53%

n=189 Source: Morrison Institute for Public Policy

Who populates Arizona's "high culture" cluster? No surprise here as elsewhere, they tend to be older, wealthier people with relatively higher levels of education. And they are geographically concentrated in Maricopa County (which includes Phoenix) and Tucson, suggesting there are fewer cultural venues outside the state's metro areas as well as social and cultural barriers to participation within them. Again, the disappointing figures point to potential
target audiences.

Challenges of a Changing Arizona

Which brings us to the most problematic factor in audience development in the state: changing demographics. While, for many years, Arizona's population was rapidly growing, it has now ceased to, so population growth, at least in the near and possibly longer term, is no longer a reliable way to increase audiences. In addition, the state has one of the highest ratios in the country of retirees and children to people of earning age, and this may increase in the future, thus further reducing the "paying customer" pool. Add to this the fact that those who are older are predominantly white and relatively educated and those who are younger are predominantly Latino and, statistically at present, more likely to drop out of education before earning degrees. Even if minority education improves and graduation rates rise, the next generation isn't necessarily attracted to the art forms that appeal to the older group. And while the number of arts venues in the state has increased considerably over the last few years, the question that must be asked is: Are we planning now to attract the audiences of tomorrow?

One more down side before we consider possible solutions: money.[4] Arizona, with its "boom and bust" economy reliant on real estate growth and retail sales, will likely be one of the slowest to rebound from the economic downturn, meaning arts organizations, to avert more cutbacks and possible closures, urgently need innovative plans to preserve and develop audiences.

Strategies for Consideration

Here are some strategies to consider to reconfigure, scintillate, and build audiences.

- *Know your current audience*. Who uses your services and why? What are the tastes, values, and motivations that inspire interest and support? Are there distinctive types of audiences and audience subgroups? Until recently, for every five people who relocated to Arizona each year, three left, which made it difficult for any organization to know and communicate with its constituents. With the current, steady-state population, arts organizations can follow and really get to know who attends. This is the time to talk to audiences and gather feedback in focus groups and surveys. Learn what content visitors want and the forms in which they imagine it being delivered. How much do they want to interact with each other in the space and with the creators of the programs they come to see? What do art and music, for example, mean to them? What would their lives feel like without these experiences? How would they feel if their children didn't learn forms of self-expression in school? What would happen to their emotional lives and the subjects they are moved to talk about if, suddenly, the arts were eliminated from their lives?

- To spur attendance, several Arizona museums, for example, are experimenting with alternatives to traditional memberships and offering "buy ahead at discount" packages. Others, including the new Musical Instrument Museum, are eliminating memberships altogether. Another alternative to subscriptions, which tie people to a season, is attaching discount coupons for future productions to the first, full-price ticket. We know audiences are more spontaneous in their choices than they used to be. That's why the ShowUp.com, the web-based resource of the Alliance for Audience is such a successful local innovation. On ShowUp.com's calendar, which provides timely information on theatres, museums, and outdoor venues in Greater Phoenix, Metro Tucson, Flagstaff, and Prescott areas, users can learn about performances and exhibitions, classes and workshops, venues and artists. The site also provides information about discount tickets and "last-minute" shows.

- *Know your potential audience*. Arts and cultural organizations often have a marketing budget to reach out to new audiences, but this rarely involves researching the barriers—real and perceived—that discourage involvement. Consistently and over many years, for example, the Phoenix Art Museum has presented exhibits with Latino and Hispanic themes, and yet according to audience surveys this doesn't always register, particularly with Latinos themselves. Maybe that's because potential audiences want or expect to experience Latino art represented in Latino venues or at least in institutions with broader cultural representation among its staff. Whatever the real answer, these kinds of issues need to be investigated or opportunities for inclusion and wider access will be lost.

- Competition for people's attention notwithstanding, many still have plenty of time for doing as they please—as much as five hours a day, according to some estimates.

In order to inspire them to enter cultural institutions, we need to research more pointedly the reasons people shy away from them or attend them seldom. We need to understand their values and priorities to lure them across thresholds. It's not so much "If you build it they will come," but "If people see a place for themselves they will feel welcome."

- *Let new media transform your environment and ways of interacting*. Most organizations use the Web, Facebook, and Twitter to communicate with audiences, but the institutions flourishing aren't simply using new software to deliver messages formerly delivered by snail mailed newsletters or coverage in the local press. Instead, their websites usher users into truly interactive environments. Check out the Arizona Science Center's website, for instance, an example that could work for performance spaces, too (http://www.azscience.org/). Virtual tours create the first, most striking impression about the actual spaces visitors find. Following the lead of virtual media's "special features," real cultural spaces need to part the velvet ropes and offer behind-the-scenes tours, sneak previews, dress rehearsals, involvement in exhibit development, performances of works-in-progress, etc. These elements foster connection and involvement.

- *Relocating art and culture*. Some of Arizona's most resonant and captivating cultural products are its public art—work that isn't framed in spaces set aside for the consumption of art such as museums, art galleries, and theatres. The nationally recognized City of Phoenix Public Art Program is a brilliant facilitator, installing art where people encounter the city's infrastructure—in the canals, trails, freeway and pedestrian bridges, and recycling centers. Not without its controversies, this art reaches millions and thus engages unprecedented numbers in thinking about the place and role of art in our society. Beyond this, Arizona's natural environment—the physical beauty of place, parks, and open spaces—are key drivers of residents' sense of attachment to the state. Perhaps not surprisingly, the Morrison Institute survey found a significant correlation between regular cultural activities and regular outdoor activities, strongly suggesting the need to put art where the people are. More public art, more site specific installations, more concerts in the park, more engagement beyond traditional venues. Why not sculpture "gardens" set amid wildlife trails? Public gardens with interactive patchwork plots planted and maintained by volunteer/visitors?

- *Keeping a focus on education*. Kids who are taken to museums by family members are most likely to grow up to become museum visitors. This is the most salient indicator and therefore the core of audience development. Thus there is great value to getting family groups to attend and share emotional experiences in these places. Cultural involvement is a cultural practice, emphasis on practice. It's something that has to be learned, and we cannot expect the schools to do it alone. According to the Rand Corporation's 2008 report, *Revitalizing Arts Education Through Community-Wide Coordination*, what is required is: "… sustained leadership, supportive policy, and sufficient resources." All of which are in short supply in Arizona. While arts education is treated more fully elsewhere in this report, its importance for long-term audience development can't be overstated.

It has often been said you shouldn't waste a crisis, and we are in one that won't abate soon. Here are some questions for mining the opportunity:

- What do we need to know that we don't already know about existing audiences for arts and culture in Arizona?
- Who are the potential new audiences for arts and culture? What do we need to know about them?
- How do arts and cultural organizations need to change in light of the competition, particularly from new media? How can they generate emotional experience and a sense of "inside knowledge" and connection?
- How do arts and cultural organizations need to change in light of our new economy and our new demographics?
- How are arts and cultural organizations planning for future audiences?
- What new venues, new outreach mechanisms, new niches are still to be developed?
- How can arts and culture be more available where people are?
- How do we ensure a healthy future for the audience building capacity of youth and family arts education?

Richard Toon is an Associate Research Professor at Arizona State University and Director of the Museum Studies Program in the School of Human Evolution and Social Change. He has a Ph.D. in Museum Studies from the University of Leicester, U.K., and an M.A. in Religious Studies and a B.A. in Philosophy and Religious Studies from the University of Leeds, U.K. His research interests include visitor studies, the philosophy and history of museums, and the public understanding of science. He is currently working on a book about the history of human display in museums. He was previously Associate Director for Research at the Morrison Institute for Public Policy at ASU where he developed and carried out a wide range of public policy research projects on issues of concern to Arizonans, including a series of reports on Arizona's quality of life. Before that he was Director of Education and Research at the Arizona Science Center in Phoenix.

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1 Wallace Foundation Arts Grantee Conference (April, 2008), *Arts for All: Connecting to New Audiences*, New York, NY, The Wallace Foundation, and L. Zakaras, and J.L. Lowell (2008), *Cultivating Demand for the Arts: Arts Learning, Arts Engagement, and State Arts Policy*, Santa Monica, CA, Rand Corporation.

2 Morrison Institute for Public Policy (October 2008), *How Do Arizonans Spend Their Personal Time?*, Morrison Institute for Public Policy, Arizona State University, AZ Views, vol. 1, issue 1.

3 To read this table: Row %, means, for example, that of regular concert goers 34% also regularly go to festivals; whereas for Column %, for example, of regular festival goers 44% also regularly go to concerts.

4 The latest information suggests that even in these hard times three out of four Arizonans give to charitable organizations. See, ASU Loadstar Center for Philanthropy and Nonprofit Management (2010), Arizona Giving and Volunteering 2010: Generosity and Involvement in Challenging Times, Phoenix, Arizona State University.

5 See *The Arizona We Want* (Phoenix: Center for the Future of Arizona, 2009).

Arizona Artists and Their Support Systems

Roberto Bedoya
Executive Director, Tucson Pima Arts Council

Key Points

- Arizona's artist community is vibrant, though its infrastructure is weak
- Barriers faced by artists include affordable live/work spaces, health care, a mechanism for the circulation of ideas, cultural intolerance, and limited philanthropy
- Strengths include cultural diversity, community cultural development projects, and the professional-amateur movement
- Emergent art practices include public design, mix/mash-up aesthetics, contemporary traditionalists
- Effective cultural arts policies are an important part of the support system for artists

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I dwell in Possibility–
A fairer House than Prose–
—Emily Dickinson

The key to the mystery of a great artist is that for reasons unknown, he will give away his energies and his life just to make sure that one note follows another... and leaves us with the feeling that something is right in the world.
—Leonard Bernstein

Like any artist without an art form, she became dangerous.
—Toni Morrison

To be an artist is to fail…as no other dare fail.
—Samuel Beckett

These quotes by artists illuminate an important qualities of an artist's life: they take risks, they fail, they learn, they discover, they create, they bring into being beauty, thought, emotions—an engagement with our senses, our feelings of belonging. All of these actions and affects are the results of an artist's contribution to our society.

To better understand how Arizona artists work, and how their art finds its audience, it is critical to look at the landscape of support for artists, which is the focus of this chapter. This is not an effort to describe how an artist thinks and creates, but rather is concerned with how an artist is supported in their creative explorations, whether it is through friends, family, the academy, the marketplace, heritage traditions, cultural worldviews, community, the land, philanthropy, or cultural policy.

A few years ago I worked with Eric Wallner on a research project that mapped the landscape of support for Arizona Artists for the Creative Capital Foundation (based in New York City) and the Arizona Commission on the Arts.[1] This seminal work which focused on artists developing "new works" undertook an assessment that had not been done before and provide the Arizona Commission on the Arts, The Creative Capital Foundation, and many of our state's local arts agencies and private foundations with knowledge about the distinctiveness and identity of the Arizona's artist community—their needs, aspirations, and what could be done to support them.

The Creative Capital report provided an overview summary about Arizona's cultural ecology. The artists who were interviewed for this report were ones whose explorations dealt with new forms and innovation in their disciplinary fields of practice, rather than interpretative artists (e.g. an opera singer, a Shakespearian actor, a classically trained musician). Yet these findings provide us with base-line knowledge about Arizona's support system for artists.

Environmental Conditions:

- There is a strong spirit of support and generosity among artist communities
- Relatively affordable cost of living and access to space (high percentage of artists who own property)
- Environment conductive to art-making (light, land, relaxed pace)
- The mythology of the Southwest has a strong influence on market demand, particularly in the visual arts
- Rapid growth and influx of new populations (from second homers to Mexican immigrants) increases demand for diverse cultural manifestations
- Conservative political and aesthetic forces present a challenge for innovation environments
- Word of mouth and peer social networks are important sources of information and validation
- Strong energy around DIY (do it yourself) spaces created by emerging artists

Infrastructure and Networks Conditions:

- There is lack of art service organizations and formal networks, particularly in the performing arts, that can assist Arizona artists
- There is a need for increased venues and opportunities targeting mid-career artists as well as life-long aesthetic growth
- Universities are key players here—both positive and negative—though there is a lack of ongoing training opportunities outside them
- Training programs are not adequately addressing the need for teaching artists business "survival skills"
- Overwhelming deficit of media coverage, particularly art reviews and critical, scholarly discourse for artists across all disciplines statewide
- Limited communication and "cross-pollination" between contemporary, commercial-oriented and traditional/community-based artists communities

- In lieu of formal support, individual advocates play key roles in supporting artists
- Arizona artists have strong, informal networks to places outside the state (particularly California, New York, Mexico, and South America), interstate connections appear weak

As these assessments reveal, Arizona's artist community vibrant one, yet the infrastructure for support of our artists needs strengthening. Building upon this assessment let us look at some current barriers artists face and the potentialities associated with growth.

Barriers to Strengthening Arizona's Arts Community

Affordable Live/Work Spaces:

This is an on-going challenge amplified by the recession. Phoenix's Roosevelt Row has been a catalytic force in downtown redevelopment.

Tucson's Arts Warehouse district has been slow in its development. After a long period of time and deliberations between the state, local government, and the artist community, a state-owned warehouse building on Toole Avenue has been secured by the Warehouse Arts Management District (WAMO) and can be developed as a live/work space. The current challenge is to secure capitalization funds for its development in this anemic financial environment.

In Ajo, the Curley School Project is a national model on how to create live/work spaces for artists in a rural setting. The current challenge is how to sustain their success while building capacity for the school.[2]

Health Care:

Artists are no different than those working Americans who have little or no health coverage, a fact primarily due to their status as independent contractors. In Tucson, the musicians community has come together to form TAMHA, (The Tucson Artists and Musicians Healthcare Alliance) which is a coalition of artists and art advocates dedicated to the sustainability and vitality of southern Arizona's arts community. TAMHA, which provides information about healthcare and preventative care resources, has an Emergency Relief Program.[3]

Circulation of Ideas:

Arizona is a good place for an artist to develop their artistic voice. Yet the maturing and development of these voices is hindered by the lack of means to support their continuing aesthetic education with the result that many leave the state for the east and west coasts. Failure to develop an effective mechanism for circulating ideas about art's purposes, innovative art practices, or advances in their disciplinary field throughout the state's various artists communities may result in the exodus of Arizona's artistic talent.

An important resource for the development of artists, are artist residency programs where artists of all disciplines go to work in a retreat setting for an extended period of time. These programs are innovative research-and-development labs for the arts, providing artists with time, space, and support. Arizona is lacking in such programs and opportunities.

Limited Marketplace:

If the general public is not engaged with the arts, the economic result is a more limited marketplace for artists. Educating the public to the multiplicity of artistic expression throughout will improve the art market. For example the marketplace for Native American artists is primarily along the lines of artisan practices, rather than conceptual art.

Cultural Intolerance:

The chilling effort of anti-immigration rhetoric, the assault on Ethnic Studies programs in our secondary schools, and the rise of religious intolerance has belittled our democracy and freedoms through acts of discrimination and bigotry. The response by the artist community to this civic toxicity has resulted in art works that address social responsibility and our humanistic ethos to imagine and envision our lives together in a just society.

Philanthropy:

Arizona has a limited philanthropic community that supports its artists (e.g. fellowship/ awards) in comparison to other states. Additionally funders who have a national mandate to serve the nation, their support of Arizona artists and their support systems is weak.

Ways to Strengthen Arizona's Arts Community

Diversity:

Arizona's changing demographics and the growth of Phoenix and Tucson as metropolitan regions has meant that the diversity of artistic expressions within the state has grown as well, illuminating our diverse population. That includes both large and intimate presentations, as well as participatory art practices and the singular experience an individual has with a work of art.

Community Cultural Development:

A developing field of artistic practice for Arizona artists are those who work with the public on projects designed to build civic well-being and community vitality (this is a national trend). A few examples of note:

> **Diné be' iiná, The Navajo Lifeway (Window Rock)**
> The "Navajo Lifeways and the Arts: What Plants Can Teach Us" project supports a cultural preservation effort that incorporates media arts and cultural knowledge about fiber and shepherding arts, through an investigation of plants and documenting their web of interrelationships, recovering stories, traditional practices, and inter-generational sharing at the heart of the Navajo sheep culture. The project maintains cultural values in a contemporary world and cultivates traditional knowledge through community dialogue, exhibits, and a bilingual media arts presentation.[4]

Finding Voice (Tucson)
Finding Voice works with refugee and immigrant students on how to use autobiographical writing and photography to find their personal voices while providing opportunities for civic engagement to address community issues.[5]

Gregory Sale (Phoenix)
In collaboration with Arizona State University students, Gregory Sale's "Bienvenidos here! at the Welcome Diner" project brought together Garfield neighborhood residents, the local art crowd, and the university community over a period of time for the purpose of creating a new public venue for food, art, and community.[6]

The Pro-Am Movement

Pro-Am stands for professional-amateur. As a result of the rise of new media and DIY culture, there has been a democratization of the arts—more and more citizens are making art. They may or may not call themselves artists, but they are joining choirs and community theater companies; making their own music videos and posting them on the Internet; creating literary blogs, participating in heritage practices like folk dance traditions; or engaging in artisan practices such as weaving or ceramics. The command of their artistic discipline varies, but many of them are of the caliber to have a professional career as an artist, but they don't. The Pro-Am movement is not focused on making it in the economic marketplace, but is instead concerned with quality of life issues, engaging with the arts not as a passive audience member at a performance or exhibition space, but as makers that build social capital and community well-being.

Emergent Art Practices

Public Design: Building upon artist work in arts based-civic engagement projects, artists are now working with urban planners on the design of public spaces.

Mix/Mash-Up Aesthetics: An out-growth of the musical strategy of sampling in hip-hop and alternative rock, the mix/mash-up has been embraced by artists in many disciplines resulting in flarf poetry, hip-hop theater, spoken word performance, or video DIY practices.[7]

Contemporary Traditionalists: Arizona has a rich cultural legacy grounded in its Native American, Latino, mining, and ranching culture. Many artists work with these legacies to keep them alive. As contemporary-traditionalists they do this by introducing new materials or subject matter into the traditional forms. For example, the Corrido song tradition, which is strong in Latino and youth culture, requires that the lyrics speak to the issues of the day. Native American basket-makers work with new types of materials that result in new shapes for their basket or saddle makers by using computer design software to create new patterns for their tooling.

Festival Culture: This blends the contemporary with traditional, as seen in the All Soul Parade in Tucson which combines Day of the Dead celebration practices with contemporary aerial and circus art practices resulting in a re-imagined festival practice that honors its source.

Artists and Cultural Policy

Artists do not create in a vacuum, and are strongly impacted by social, political, and economic conditions. To better understand their support systems, to strengthen what is working for Arizona artists, and to address the challenges they face, it is helpful to understand the cultural policies that impact them.

National and state cultural policy is a system of arrangements regarding the allocation of resources and the articulation of value, including the politics of participation, which can be connected to aesthetic judgments, administrative practices, policy research, and stakeholder participation. This prompts a number of questions:

- Whose voices may be privileged or marginalized in policy discourse: the artist, the curator, the arts administrator, the foundation program officer, the board member, the elected official, the scholar, the social science researcher, or the community leader?
- How do each of these stakeholders define, evaluate, and perceive art and culture similarly and differently?
- With regards to cultural policy research, how are policy practices and analysis shaped by research methodologies?
- Does such research reinforce the power of existing policymakers, or do they bring new voices to the table?
- What do democratically informed policy practices look like?
- Where are artists in this system of arrangements?

Cultural policy sometimes can be easy to understand, as with, for example, a curatorial policy to present new works, or an organization's policy to pay artists a fee for exhibiting their work. At other times its lack of clarity can be a source of conflict, as seen in the debates about arts education, support for individual artists, and strengthening cultural infrastructure programs. Another debate that concerns artists is focused on copyright and intellectual property as it relates to concepts of public purpose, and what is common and what is owned.

Arts administrators are intermediaries engaged in how artistic practices circulate and have an impact. Cultural policy is complex, and affects the livelihood of artists and cultural advocacy. Arts administrators serve as go-betweens who affect how artists are supported, how their work finds an audience, and how an organization honors its mission. While artists can negotiate some of these issues, more often it is arts administrators who do this, a process that comes with its own inherent tensions. As culture is increasingly privatized, how and by whom, is artistic value defined—is it economic, aesthetic or ethical value? What administrative system can best support the needs of artists?

There is a difference between efforts to affect public policy through the arts, and how art in and of itself creates public policy, yet many of the studies examining art and public policy do not consider artists as policy-makers. Art as public policy is a manifestation of cultural citizenship. One example of arts as public policy may be seen in the red ribbons artists created to sound the alarm on the AIDS epidemic, and the subsequent public recognition that resulted in changes in national health policies. Similarly, photographs by Ansel Adams of the American wilderness created broader environmental awareness, resulting in environmental protection policies. In community-based arts projects, artists understand the kind of cultural engagement that can create a sense of community. Thus, artistic practice can be a transformative force by defining the important place of the arts in contemporary society.

Arts administrators regularly attempt to measure the cultural world through surveys, mapping projects, and instrumental portraits of cultural participation. Such efforts produce a better understanding of the sociology of art, and of the practices and institutions that make possible artistic production, resulting in information that can be used to improve the support systems for artists without foreclosing artistic exploration. Both artists and administrators passionately use their hearts and minds to imagine possibilities to encourage public participation. Thoughtful cultural policy has the potential to benefit artists and audiences, to enrich our understanding of the risk, freedom, responsibility, beauty, and poetic engagement with the world, and to foster the mystery and courage of aesthetic imagination in the arts.

The recession has deeply affected the cultural sector, compounding its weak and stressed fault-lines, as seen in the under-capitalization of artist-centered organizations. Cultural administrative systems are being urgently asked to address the growing pragmatic needs of artists in innovative ways. The arts have an ability to push, challenge, and re-imagine the world around them, as well as to advocate for new ways of thinking about society.

The Actions of Stewardship

Arizona prides itself in being a thoughtful steward of the land manifest in the preservation of open spaces, as well a responsible environmental steward in how to conserve and manage the state's natural resources. Citizens are also stewards of a richly diverse cultural heritage, including Native American, Latino/a, the Old West ethos, and mining and ranching legacies. And most important, Arizonans are stewards of the arts, of imagination, and of the creative spirit.

Being good stewards of the arts means many things: celebrating our cultural communities and what they give us, working to strengthen and support artists and arts organizations, and experiencing the arts and culture. This leads to the actions that individuals can take to support the arts during the economic downturn—go to a play, join a choir, visit a museum or a gallery, see a dance performance, sign up for a drawing class, celebrate your heritage, write a poem, make a video and post it on YouTube, play an instrument, share your song and your creative expressions with others—share that art with your family, friend, neighbors, and our community. It is through these creative expressions and passion for life that Arizonans will grow and prosper. Make it, Experience it and Share it. Support your local artists, feed your own creative impulse. Do Art.

What art offers is space—a certain breathing room for the spirit.
—John Updike

Art is both the taking and giving of beauty; the turning out to the light the inner folds of the awareness of the spirit. It is the recreation on another plane of the realities of the world; the tragic and wonderful realities of earth and men, and of all the inter-relations of these.
—Ansel Adams

It is real desert people who lift their faces
upward with the first signs of moisture.
They know how to inhale properly.
Recognizing the aroma of creosote in the distance.
Relieved the cycle is beginning again.
These people are to be commended.
—From "Proclamation" by Ofelia Zepeda

A Case in Point: Supporting Arizona's Artists: Local Arts Councils

Julie Richard
President & CEO, West Valley Arts Council

There are currently thirty-six arts councils within the state of Arizona providing services from Ajo to Lake Havasu, and Peoria to Prescott. According to Americans for the Arts, local arts councils are "community organizations or agencies of local government that provide services to artists and arts organizations and/or present arts programming to the public. Each local arts council is unique to the community it serves." Local arts councils can be non-profit organizations or city-based. Non-profits behave differently than city-based councils and no two arts councils are exactly the same.

Local arts councils are on the front lines of cultural development and arts program delivery in Arizona. Before there were any organized arts organizations in many regions in Arizona, there was the local arts council. Councils are the best place to look for artist services and to get connected to arts and culture when moving to a new region. Arts councils are unique in that they connect the public to every kind of art form from visual art to literary art to the performing arts and many other arts forms in between.

Non-profit arts councils provide many kinds of services to **arts organizations** including the following: grants, loans, managerial consulting, directories of local artists and arts organizations, calendars of events and programs, marketing services, and advocacy. Councils often take the lead in collaborative programming such as festivals and other large programs such as the West Valley Arts Council's Big Read—a National Endowment for the Arts sponsored program that encourages the public to read classic literature. The West Valley Arts Council (a regional council that primarily serves thirteen cities in the western suburbs of Greater Phoenix) coordinates over sixty library, school, arts, and other partners across the state of Arizona to deliver more than 150 events during this month-long program each year.

Arts councils can also provide the following services to **artists**: directory listings, training and workshops, exhibition opportunities, participation in open studio tours, participation in festivals, connections to school and other teaching opportunities, consulting, work from direct inquiries for a specific type of artist, advocacy, and networking.

Arts councils can provide the following services to **cities**: public art assistance and consulting, cultural planning, facility planning—building and operations, sub-granting of city funds (Scottsdale Cultural Council provides this service), programming for residents, and, of course, that essential element to create a "livable community" when the council may be the only arts organization serving that city.

At their core, arts councils serve the **community** by being an information resource, by providing programming, through facility management and programming (such as the Scottsdale Cultural Council which manages and programs the Scottsdale Center for the Performing Arts and the Scottsdale Museum of Contemporary Art), through advocacy information and dissemination, and through arts education services.

City-based arts councils and commissions are different from non-profits in that they are more limited in their scope of offerings. City arts councils can oversee and administer the public art program within the city, provide grants for arts programming, and advocate for the arts in their community. Because they often have limited fundraising ability, they regularly partner with other groups for programming.

Roberto Bedoya is the Executive Director of the Tucson Pima Arts Council. He is also a writer and arts consultant who works in the area of support systems for artists. As an arts consultant he has worked on projects for the Creative Capital Foundation and the Arizona Commission on the Arts (*Creative Capital[1]s State Research Project*); The Ford Foundation (*Mapping Native American Cultural Policy*); The Ford and Rockefeller Foundations (*Creative Practice in the 21st Century*); and The Urban Institute (*Investing in Creativity: A Study of the Support Structure for US Artists and the Arts and Culture Indicators in Community Building Project*). He is the author of the monograph *U.S. Cultural Policy: Its Politics of Participation, Its Creative Potential*. Bedoya has been a Rockefeller Fellow at New York University and a Visiting Scholar at the Getty Research Institute in Los Angeles.

Julie Richard is currently the President & CEO of the West Valley Arts Council which operates in the West Valley of Greater Phoenix, Arizona. She most recently held the position as Executive Director of the Metropolitan Arts Council in Greenville, South Carolina. Julie earned B.S. degrees in Psychology and Music and a M.A. in Business from the University of Wisconsin-Madison. Previous positions include Managing Director of Tulsa Opera in Tulsa, Oklahoma; Managing Director of Syracuse Opera in Syracuse, New York; and Executive Director of the Cayuga Community College Foundation in Auburn, New York. She is a member of the WESTMARC Board of Directors, the City of Surprise Arts & Culture Board, and the Arizona Citizens/Action for the Arts Board. She has held many positions on boards including national Board positions with Americans for the Arts and the University of Wisconsin-Madison Bolz Center for Arts Administration. She has presented at numerous national conferences on topics such as board governance, strategic planning, fundraising, arts education programming, marketing the arts and more.

[1] See, Eric Wallner and Roberto Bedoya, *Creative Capital State Research Project: Findings for Arizona and Maine* (New York: Creative Capital, September 2007). For more on this organization, see http://creative-capital.org/. Arizona was selected as was "uniquely poised to benefit from the sort of intervention that Creative Capital was proposing: 'Arizona is the second-fastest growing state, witnessing intense development and unprecedented cultural and ethnic expansion.' Four vibrant urban centers—Flagstaff, Phoenix, Tucson, and Yuma—offer a wealth of nationally recognized art collectives, dance studios, and interdisciplinary presenting organizations, while in rural communities, artists continue to work in both traditional and non-traditional forms. With the rapid growth of Phoenix in particular, artists are eager to make their voices heard in discussions of urban development and urban design." (pp. 2-3).

[2] For more on Curley School Artisan Lofts, see: http://www.curleyschool.com/

[3] See, http://www.tucsonartists.org.

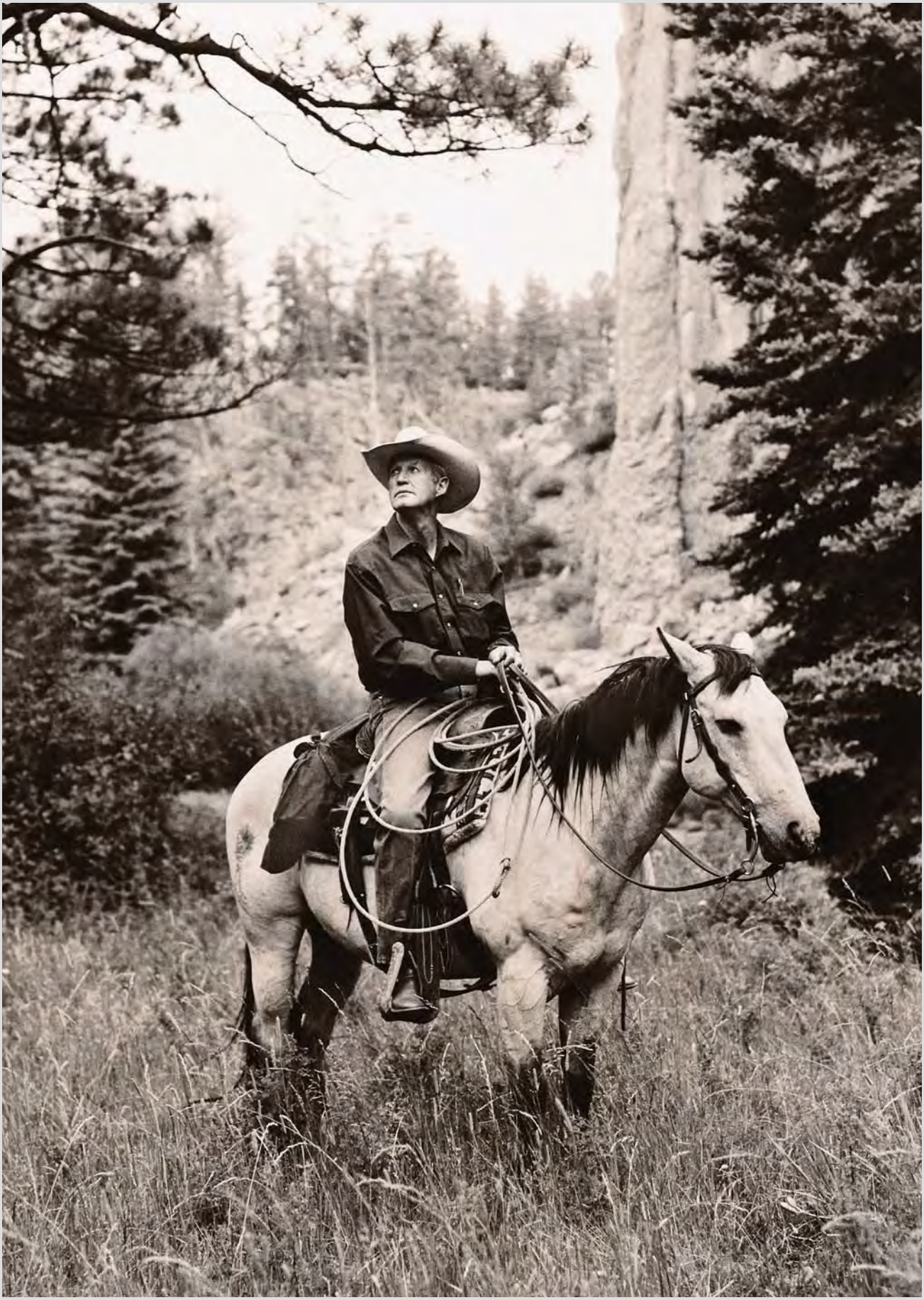
[4] See, http://www.navajolifeway.org/.

[5] See, http://www.findingvoiceproject.org/.

[6] For more information on this project, see: http://www.gregorysaleart.com/project_12_h_welcome.html

[7] Wikipedia characterizes flarf poetry as "an avant-garde poetry movement of the late 20th century and the early 21st century. Its first practitioners utilized an aesthetic dedicated to the exploration of "the inappropriate" in all of its guises. Their method was to mine the Internet with odd search terms then distill the results into often hilarious and sometimes disturbing poems, plays, and other texts." (http://en.wikipedia.org/wiki/Flarf_poetry). This is related to Spam Lit, Spoetry, and Googilism.

6. Scott T. Baxter, *Sam Udall at the Y-Cross Ranch, Eager, Arizona*, August 2005, silver gelatin print, 16 x 16".



New Voices, New Visions

Arizona continues to attract talented and visionary arts leaders who invigorate our cultural community. The essays in this chapter have been written by five institutional heads in Phoenix, Tempe, Tucson, Mesa, and Scottsdale who are relatively new to Arizona. They address the "what brought you here?" question, the engaging possibilities they saw, how those linked with their own vision for the arts and the institutions they now lead, and what struck them about the opportunities they saw in deciding to come to Arizona. Those of us who have been here many years need new voices such as theirs to make us stand up and pay attention to things that may have gone off our immediate radar. Their visions engage new directions, while refreshing the established institutions whose leadership they have assumed. As the concluding chapter to *Capitalizing on Arizona's Arts and Culture*, they echo many of the issues tackled by the other contributors to this report, while offering new perspectives on where to go in future.

Museum as Cultural Tourism Destination

Letitia Chambers, President and CEO, Heard Museum

The Heard Museum has a national and international reputation built over many decades. It is known for the high quality of its exhibits with visual impact and educational content, as well as for the depth and breadth of its collection of American Indian art and artifacts.

I moved to Phoenix in January 2010 to become the leader of the Heard Museum, and was surprised to learn that the over 70% of its visitors are tourists. Cultural tourism is important to the economy of Arizona, and the Heard is a key attraction. It is my intention to work closely with local, state, and tribal government leaders to increase cultural tourism in the state.

As a newcomer to the Valley of the Sun, I have been impressed with the quality of the arts here. Phoenix residents who take part in arts activities are rewarded with the high quality of the experience. Collaboration among arts and culture organizations is also strong here and serves to enrich the cultural life available in the area.

The Heard Museum is primarily supported by revenue that it earns from admissions, memberships, shop sales, and its restaurant. Donors provide approximately one third of its revenues. One of my major goals as the President and CEO of the Heard Museum is to bring financial stability and to build an endowment and capital and operating reserves.

The most successful arts organizations are those that recognize the importance of operating as a business, albeit a nonprofit business. The Heard is adopting a business model to increase its financial viability and assure its future in all economic climates.

The fact that only 30% of the Heard's visitors are from Arizona means that the Heard needs to reach out to local audiences to take part in the many entertaining and educational experiences offered. We have spent the past year analyzing how we can improve our visitor experience and attract more local visitors to the museum.

The Heard has an important role to play in educating our visitors about the indigenous populations of our region and of the Americas. There is a great need in Arizona for an appreciation of cultural diversity and the commonality of the human experience. The Heard is starting a new advertising campaign as a part of our outreach to Arizona residents that is based on the theme, "More in Common than You Think." It is important that cultural and educational institutions in the valley play a leading role in raising the level of discourse and understanding.

My hope is to reach more residents so they can enjoy exhibits, performances, festivals, dining, and shopping at the Heard Museum. The Heard is a world-class museum, but it is more than a museum. It is a destination.

Advancing Positive Social Change Through the Arts

Gordon Knox, Director, Arizona State University Art Museum

The answer to the "What brought me here?" question is simple: Arizona today offers an exceptional opportunity for the arts to advance positive social change, and working with the arts toward those ends is exactly what I do. The position of Director of the Arizona State University Art Museum was an ideal match.

Art is a verb; it is a way of knowing, a way of telling; it is a conversation. An object in a museum is not "art" by itself; these objects, paintings, and exhibitions become art only in relationship with the viewer, when the conversation takes place, when the ideas embedded in these object are activated by the inquisitive mind of the beholder.

First and foremost, humans are social creatures. Our defining characteristics rest on collective projects and joint efforts—language, for example, is a massive multi-generational, on-going, collective project, as are market systems; tribal, national and religious identities; and the great bodies of scientific and social knowledge we have amassed over millennia.

Our really big and enduring accomplishments are done together. Art is based on this collectiveness—it is a way of exploring the world and communicating to each other what we know. An art museum is a gathering place for these explorations and conversations, an articulation point for the circulation of ideas. A university museum, free and open to all the public and also linked to the full range of research and understandings underway at a university, is a powerful conduit for knowledge, a place for the exchange of ideas and understandings.

We can talk at great length about the problems facing the arts today in Arizona, as they are legion: reduced budgets locally and statewide, a general perception of the arts

as "superfluous" rather than "core,"' a general sense of doom and fear (economic dismay or invasion by "others") that dampens creative risk-taking and intellectual curiosity, a sense that the arts may undermine conservative values.

But perhaps it is more useful to talk about the opportunities for the arts that are present in Arizona today. There is a healthy array of active artist- and community-led local arts programs all over the state, many of them deeply embedded in the communities they serve. Phoenix is a genuinely multi-cultural city, accepting more international refugees every year than the nation of England, creating a social context where visual, musical, culinary, and narrative communication through the arts can be a major unifying force. Scottsdale has one of the nation's leading public art programs, the Phoenix Art Museum is the brightest light in encyclopedic visual arts between Denver and Los Angeles, and Tempe is home to ASU, which is truly one of the most recognized innovators of accessible excellence in education and avant-garde research in today's post-disciplinary reality. There is an extraordinary base-culture here in Arizona for the emergence of powerful new art projects to expand our thinking and connect us to each other and our shared roots and values. The collective exploratory nature of the arts, and the embedded qualities of communication and empathy that define the artistic process, reconfirm for all of us that we are more similar than we are different—as a species, we are all here together and interdependent.

Re-Shaping the Histories of Photography

Katharine Martinez, Director, Center for Creative Photography, University of Arizona

What brought me to Arizona and specifically to the Center for Creative Photography at the University of Arizona? Three compelling attributes made this a very attractive position.

First, the Center for Creative Photography is a world-class cultural institution with an extraordinary history. It was founded in 1975 by Ansel Adams, the American photographer who changed how we see the landscape of the American West, in collaboration with the young and visionary University of Arizona President John Schaefer as a center for the appreciation and understanding of creative photography. It is noteworthy that they chose not to name the institution the museum for creative photography. From its beginnings the Center was an archive, that is, collections of the private papers, business records, memorabilia, and photographs of the leading North American photographers, accessible for research and appreciation through its study center, exhibition galleries, and publications. Launched with the founding archives of Ansel Adams, Harry Callahan, Edward Weston, and Garry Winogrand, the Center has grown to become the largest archive in the world devoted to American photographers. Today the Center houses approximately five million photographs and documents and, along with the George Eastman House and the Library of Congress, is one of the world's leading sites for advanced study in the history of American photography. Through its exhibitions and publications, the Center reaches a global audience.

Second, I wanted to be involved in shaping the on-going history of photography, by nurturing an environment that enables researchers from around the world to study, think, look, debate, and write. As a special collection within a university library, the Center is part of an enterprise that supports inquiry and learning. The Center is about much more

than preserving a collection of collections. It is a gathering place for students and scholars, and a forum for the creation of new knowledge. Expanding the frame of reference for photographs beyond the history of photography is also what I promote. Our collections support research that uses photographs as evidence for the study of social, cultural, and political history. Topics can include the history of war, families and everyday life, science, and in particular the environment, immigration, religion, the Civil Rights Movement, fashion, performance, and entertainment, to name just a few.

Third, I came to the Center to be directly involved in an art form undergoing enormous changes. In the thirty plus years since the Center was founded, universities have created faculty positions devoted to teaching the history of photography, museums have established photography collections and hired photography curators, and prices for certain photographs command the attention of collectors, curators, dealers, and auction houses. At the same time, the line between fine art and other kinds of visual images is dissolving, manifested in museum exhibitions, scholarly publications, and the art market. The greatest shock to the photography world since 1975 is the advent of digital photographs and the means to share them easily and cheaply. Digital photography now makes it possible for anyone to be a photographer, and the Internet allows anyone to promote their photographs without the filter of the marketplace or scholarship. The public looks at photographs in a different fashion. So what is the role of a center for creative photography? What should we be and what should we collect? It is an exciting time to be the Director of this extraordinary place.

A New Home

Cindy Ornstein, Executive Director, Mesa Arts Center

February 2010—My first visit to Arizona. I was mesmerized by the beauty of the mountains and their varied contours sculpted by the sunlight. The palms, cactus, and scrubby trees against desert, adobe, and tan and red tiled roofs presented a truly alien terrain. It couldn't be more different than the flat grey and brown I'd left behind in Michigan.

Compared to the industrial Midwest, the attention to the built environment was striking—nicely designed walls with embedded designs, carefully landscaped borders along streets. Public art was everywhere—in front of public buildings, on the light rail platforms, on the highway—not only was there a work of sculpture on a pedestrian overpass, but even the road's retaining wall and embankments were embellished with designs. I was excited by the natural beauty around me and the obvious commitment to design and aesthetics.

I had come to find out more about an intriguing job in Mesa—to see the place and meet the people, to discover if this might be an opportunity compelling enough to take me from a job and community I loved. I had already learned of the strong arts institutions across the Valley, that the silos between the institutions were being broken down, and that there were many quality of life benefits to the region.

I arrived a day early and had the chance to wander in downtown Mesa and at the Mesa Arts Center. What a lovely and civilized downtown—the "bones" were solid, and the potential was

palpable. The city's Arizona Museum for Youth and Arizona Museum of Natural History were amazing resources for the whole region, and the Mesa Arts Center was incredible—a wonderful design in an inviting space. All the ingredients promised a vibrant community gathering place for creative, engaged learning and sharing. Unbelievably, public funds had paid for 95% of the Mesa Arts Center, built five years earlier, and now the largest arts center in the Southwest. What a statement that made about the Mesa community's commitment to arts and culture!

Ultimately, that is what really brought me to Arizona: the shared vision, the support and the potential. My interview process was thorough, and I met community members and leadership, colleagues and donors. I freely shared my commitment to using arts and culture to strengthen relationships, enhance and stimulate learning, and build the fabric of a community. I talked about the importance of nurturing creativity, and of building an exciting urban center. We discussed the importance of building meaningful and equitable partnerships, and the need for the entire community to feel welcome and engaged—to experience their literal ownership in the City's arts and culture venues. At that time, and in the months since, these values have been expressed by the broad array of community representatives I have met. We have a shared dream.

There is a heritage of aesthetic values that is still strong here today. Though threatened, the arts are still more present in Arizona schools than in many parts of the U.S. The environment and natural resources create fertile ground for science institutions. The diverse and rich heritage provides lessons for the future, and is sorely needed to heal divides and generate respect for differences. The great diversity of ethnic groups and origins create an interesting and complex populace, and a comfortable place for a displaced Northeasterner. The importance of tourism to the region should help sustain the enlightened self-interest of preserving and creating assets that will appeal to visitors.

Despite the daunting economy and tumultuous times, and maybe in part because of them, the arts and culture have a foundational role to play in creating a stronger, more engaged and more successful Arizona, and I look forward to being a part of it.

Going East to Come West

Tim Rodgers, Director, Scottsdale Museum of Contemporary Art

When I was an undergraduate art history/studio art major at Arizona State University, one of my advisors told me that if I wanted a job in the arts I had to go east to go west. What he meant was that I needed to attend an east coast graduate school in order to secure an arts position in the west. So I went to Brown University where I received my Ph.D. in art history; now I find myself, nearly thirty years later, back in the Arizona. What I learned on this long journey home informs every decision I make in my new position as the Director of the Scottsdale Museum of Contemporary Art. It also provides a perspective for me that is as informed by the issues of the west as the east.

For example, eastern museums have a grounding in the community that extends back generations. Many of their donors and philanthropists are educated by parents and peers to

give both of their time and wealth. Their social standing is directly tied to their support of their community. The idea that a community, its citizens and its institutions must be supported and maintained for the betterment of all is the basis for many social institutions. Libraries, museums, cultural centers, gardens, zoos, and universities all thrive because of the support and generosity of citizens who believe in the value of these non-profit entities. City, state, and federal governments also recognize the value of these institutions for the citizens and grant them distinct status and assist them with public revenue. All of this aforementioned support has been forged in the east over many decades. In the west, however, this delicate web of support is both relatively new and increasingly fragile.

The reasons for this are many, but in the west a widely-held philosophy grounded in individualism clashes with collective desires and community building. Individualism, as the word implies, focuses on the individual over the group and stresses the importance of self-reliance and independence. Among the many ironies related to this philosophy in the United States is that it is most often articulated and affirmed through collective enterprises and institutions, e.g. public schools, mass media, and other technologies. And some of the people most likely in the past to proclaim and advance the power of the individual were artists such as Oscar Wilde who rebelled against the tyranny and oppression of the majority.

If the attachment to individualism could be set aside, western states could get down to the need to build, shape, and support communities and their attendant institutions. It is my vision for SMoCA that it further develop its role as a builder of community. Our exhibitions and educational programs have always reached out to the public to engage them in intelligent conversation and with stimulating ideas, but our museum spaces, hours, and outreach have sometimes been intimidating and limited. To correct this, I will be changing the hours of the museum to better serve the working members of the community, attempting to eliminate or reduce ticket costs, and transforming one of the museum spaces into a flex use space for educational and leisure activities. I would like to believe that if we can support our western communities and institutions, then we would not need to send our arts enthusiasts east so that they can come back west.

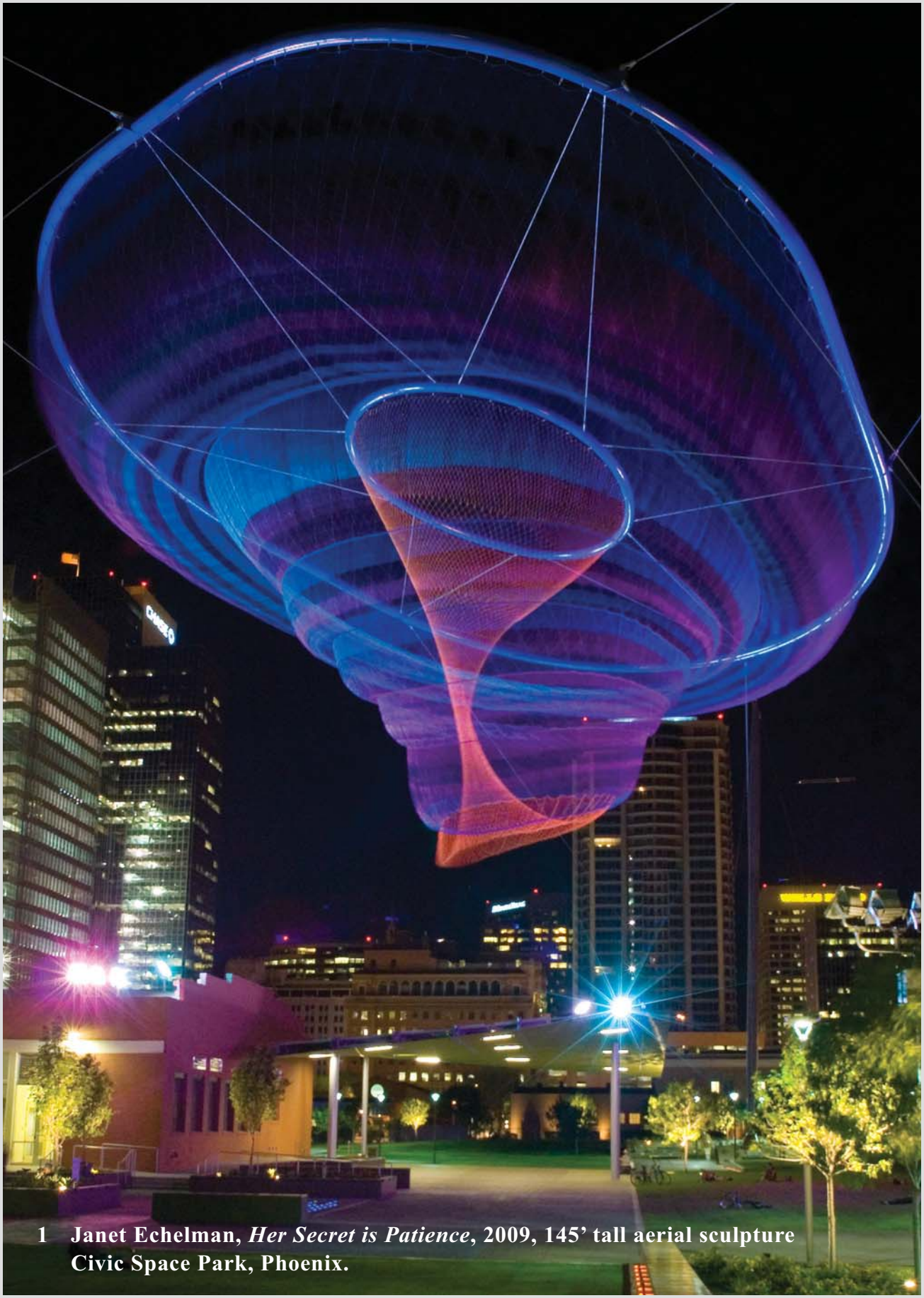
Letitia Chambers is the President and CEO of the Heard Museum in Phoenix, which showcases American Indian art, including both traditional and contemporary works. Its mission is to educate the public about the heritage and living cultures of the indigenous populations of the Americas. The Heard is nationally and internationally known for the quality of its exhibits and programs. Dr. Chambers has previously held senior management positions in the private sector, government, and education. She served as President and CEO of a Washington, D.C., based consulting firm, and later as a Managing Director at Navigant, a global consulting firm. Dr. Chambers headed up the system of higher education for the state of New Mexico where she worked to revamp and reform key aspects of the system. She led the agency responsible for oversight of all public colleges, universities, and community colleges in the state. Dr. Chambers also chaired the New Mexico Educational Trust Board, served as a Board Member of the New Mexico Student Loan and Guarantee Corp, and was an active Commissioner of the Western Interstate Commission on Higher Education. She was nominated in 1996 by the President and confirmed by the Senate to be U.S. Representative to the United Nations General Assembly, a position of ambassadorial rank. In that capacity she made significant contributions as a member of the Management and Budget Committee of the General Assembly. In 1992, she served on the Clinton/Gore transition team as Chief Budget Advisor, leading the Budget Policy Group and developing drafts of the President's Economic Plan. Earlier in her career, Dr. Chambers served as Staff Director of the U.S. Senate Committee on Labor and Human Resources, which had jurisdiction over education, labor law, and social service programs. She was the first woman to head the staff of a major standing committee of the U.S. Senate. Prior to that she served as a senior staff member on the Senate Budget Committee and the Senate Special Committee on Aging. Dr. Chambers has served on corporate boards, particularly in the financial sector, and on numerous educational and philanthropic boards, many of which have focused on the arts and American Indian arts and cultures. A graduate of the University of Oklahoma, she holds a doctorate in educational research and curriculum development from Oklahoma State University.

Gordon Knox is currently the director of the Arizona State University Art Museum. Previously Knox led Global Initiatives at the Stanford Humanities Lab, where he identified, developed, and implemented international projects that combine the understandings and techniques of the humanities and the sciences, and engage them in on-the-ground efforts to effect social change. Prior to Stanford, Knox was artistic director at the Montalvo Arts center in Saratoga, California, where he designed, developed, and established the organization's international artist residency program. Implementing his commitment to the open flow of ideas and underscoring his belief that the advancement of civil society requires articulate critical analysis, Knox helped establish Montalvo as an institution recognized for ambitious projects often involving unusual collaborations. During the 1990's, as the founding director of the Civitella Ranieri Foundation in Italy, Knox envisioned and established a center for the arts designed to advance and widen contemporary cultural practice by engaging the voices and thinking of practitioners from all parts of the world and providing them with excellent conditions to advance their work. Civitella quickly became a new model for international, multidisciplinary residency programs. Knox's interest in the relationship between the arts and society and in critical, artistic inquiry emerges from his studies in social anthropology focusing on the relationship between ideas and social action. Knox studied anthropology at the University of California Santa Cruz, Cambridge University, and the University of Chicago.

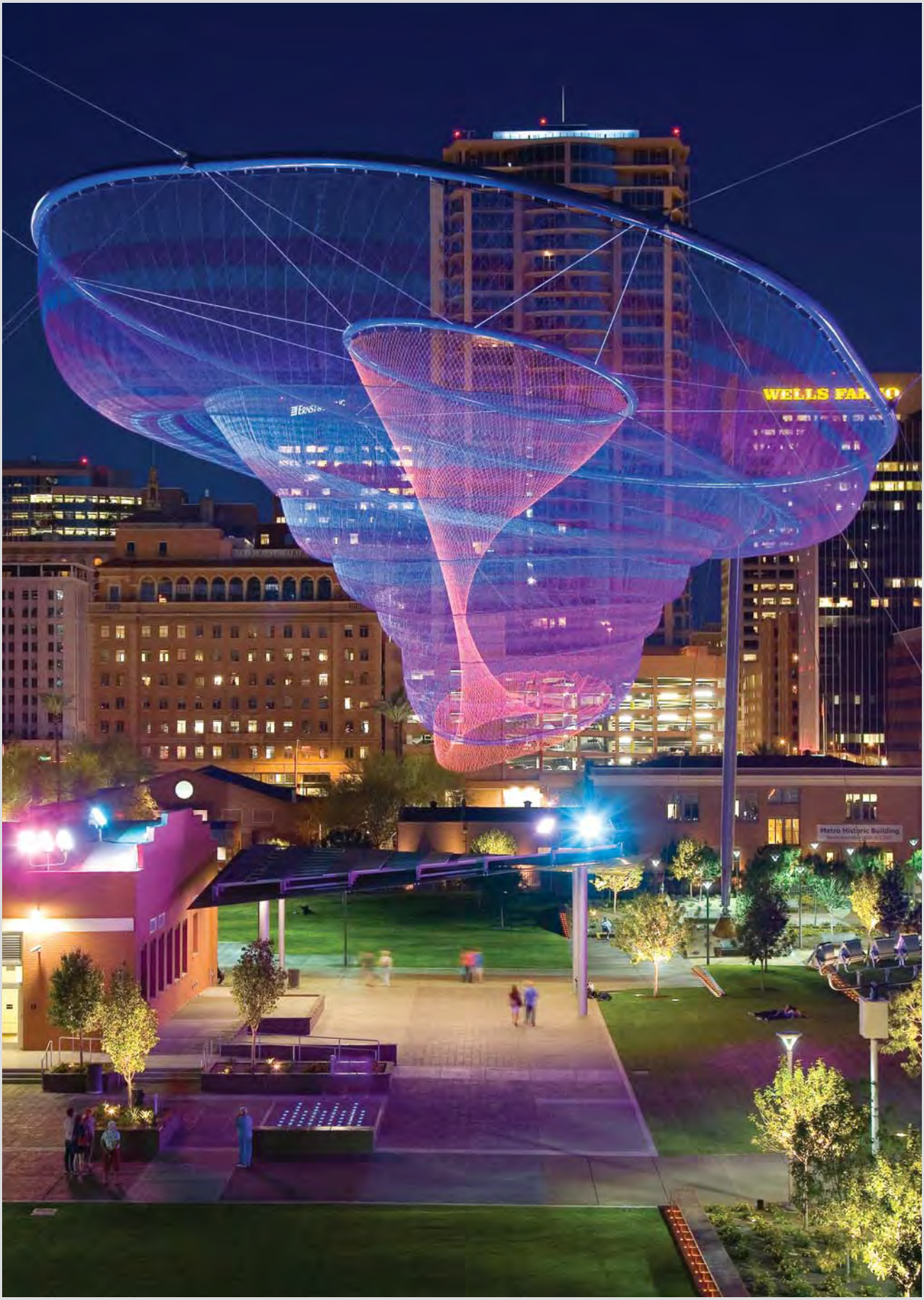
Katharine Martinez is Director of the Center for Creative Photography at the University of Arizona. Prior to this appointment, Martinez served as Director of the Fine Arts Library in the Harvard College Library, where she oversaw a collection of more than 1.5 million photographs and prints. She also served as the Herman and Joan Suit Librarian and oversaw the Harvard Film Archive, with its collection of more than 10,000 35mm and 16mm films and several thousand posters, and robust public film program. She has experience managing photographic collections at Harvard University, Stanford University, Columbia University, the Smithsonian Institution, and the Winterthur Library. Martinez has curated exhibitions for the Cooper-Hewitt Museum, earned fellowships from Harvard University Library and Stanford University Library, served on the editorial board for *American Quarterly* and acted as a member of the Board of Directors of Research Libraries Group (RLG). She is also a past-president of the Art Libraries Society of North America. Martinez earned her bachelor's degree in art history from the University of Delaware, followed by a Master's of Library Science degree from Indiana University and doctorate in American Studies from George Washington University. Her areas of expertise are 19th and early 20th century visual culture, particularly the intersection of high art and popular taste and the reception of images. She is currently at work on a book manuscript titled "Craze for Pictures: The Production and Reception of Photographic Images in the U.S. 1880-1920."

Cindy Ornstein joined the City of Mesa as Director of Arts and Culture and Executive Director of the Mesa Arts Center (MAC) in July, 2010. In addition to leading the MAC, Arizona's largest arts center encompassing four theatres, fourteen performing and visual arts studios, and the five galleries of Mesa Contemporary Arts, she oversees the Arizona Museum for Youth and the Arizona Museum of Natural History. Prior to coming to Mesa, Cindy was President and CEO of the Flint Cultural Center Corporation in Flint, Michigan, Associate Director of the Allentown Art Museum, Allentown, Pennsylvania, and Executive Director of Mayfair Festival of the Arts in Allentown. Before entering arts administration, she was the Director of Corporate Communications at Rodale Press, Inc., a leading book and magazine publisher, and worked in the public relations agency business in New York and Atlanta, including holding vice presidencies at the world's two largest public relations firms. She began her career as an advertising copywriter and a journalist, and also worked in theatre as an actor and director in Chicago and New York. Currently, she serves as a member of Arizona's Cultural Data Project Task Force. She was appointed by Michigan's Governor to two terms as a Council Member on the Michigan Council for Arts and Cultural Affairs and served on the Executive Committee of the board of ArtServe Michigan. Ornstein earned a B.A. degree in English from Vassar College and is currently completing a Masters degree in American Culture from the University of Michigan.

Tim Rodgers is Director of the Scottsdale Museum of Contemporary Art and Vice-President of the Scottsdale Cultural Council. He provides executive leadership, curatorial direction, and management for the Scottsdale Museum of Contemporary Art (SMoCA) and works collaboratively with the other Cultural Council divisions: The Scottsdale Center for Performing Arts and the Scottsdale Public Art program. Rodgers received a Ph.D. from Brown University in History of Art and a B.A. degree (summa cum laude) from Arizona State University. An experienced art academic, writer, lecturer, and curator, first at Brown University and later tenured at Lawrence University, Appelton, Wisconsin, where Rodgers served as the Curator of the Wriston Art Center Galleries and Professor of Modern and Contemporary Art. Prior to his current position, he served as Chief Curator at the New Mexico Museum of Art, Santa Fe.



1 Janet Echelman, *Her Secret is Patience*, 2009, 145' tall aerial sculpture Civic Space Park, Phoenix.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Arizona's Future: The Choice is Art

Robert C. Booker
Executive Director, Arizona Commission on the Arts

Key Points

- Arizona's fiscal crisis has contributed to a cultural crisis in the state's arts industry
- The many people employed in Arizona's arts sector which help build our economy
- Public funding for the arts has decreased dramatically since 2008
- Children who receive art instruction as part of their education have greater success in reading, mathematics, critical thinking, and social skills, and are more likely to stay in school

The Arizona Environment: Where We Are Now

Arizona has long been considered an enterprising and independent state, enjoying extraordinary population growth, vast undeveloped landscapes, and abundant cultural and economic opportunity. Yet there is little doubt that The Great Recession has forced unprecedented challenges on our state.

With notable failures in the real estate and credit markets and because of the homogeneity of its construction-dependent growth economy, Arizona's fiscal health has suffered greatly since FY2008. For FY2009 and FY2010, Arizona's budget shortfall climbed as high as 33% of its general fund budget, one of the highest percentages of shortfall in the nation. Current projections indicate continued state budget shortfalls through FY2014.

Legislative budget reductions and fiscal maneuvering have not succeeded in balancing the budget and have resulted in record cuts to public education and health services. We've seen mandatory salary reductions for all state government employees. Attempts to balance the budget have included "sweeps" or "raids" of dedicated funds, the sale/leaseback of government facilities, and year-to-year deficit rollovers. In May 2010, voters overwhelmingly approved a temporary increase in the state's sales tax, a move intended to mitigate further fiscal damage to public safety programs and to education.

In August 2010, the Arizona Department of Commerce reported the state's unemployment rate at 9.7%, the highest it's been in 30 years. In September 2010, the United States Census published new data indicating that 21.1% of Arizonans live in poverty, making Arizona residents the second poorest in the nation. According to the Arizona Education Association, our public schools contend with the second-highest student-to-teacher ratio in the nation and attempt to serve the second-fastest-growing student population, yet we rank dead last in per-pupil public investment.

The Arts in Arizona: An Industry that Gives Back

While the current state of the state looks bleak in terms of economic forecasts and legislative initiatives, one clearly bright spot does shine on the potential our arts industry holds for Arizonans. According to Americans for the Arts' 2010 *Creative Industries Report*, Arizona is home to 11,600 arts-related businesses and 47,712 persons are employed in the arts sector. More than 600 Arizona non-profit organizations identify themselves as providers of arts and cultural programming. Of these organizations, an estimated 5% have annual budgets greater than $1 million; 15% have budgets between $250,000 and $999,999; 40% have budgets between $25,000 and $249,999; and 40% have budgets of less than $25,000.

A number of Arizona communities continue to be recognized as top arts destinations. In a recent *American Style Magazine* poll, Tucson and Phoenix were listed among the top 25 large city arts destinations, Scottsdale was listed as a top mid-size arts destination, and Sedona was listed as a top small city arts destination. Phoenix—Arizona's largest city—hosts one of the longest-running, best-attended First Friday gallery crawls in the nation. Participating galleries are mostly artist-owned, "do-it-yourself" spaces, reflecting Arizonans' independence of spirit.

The non-profit arts industry in Arizona is as varied as our residents. Currently 235 arts organizations receive funding through the Arizona Commission on the Arts. These organizations, on average, constitute 50% of their annual budget through contributions, memberships, and grants; the other 50% comes from earned income, classes, school residency activities, touring, ticket sales, admissions, and gift shop revenue. Of those same organizations, only about 2-8% of their budgets derive from government funding. While that amount appears modest, those monies often ensure crucial access and provide educational programs to a broad sector of Arizona's communities.

The Perfect Storm: The Effect of the Economy

The Arizona arts industry has been facing three major reductions in income:

1. Funding from state and local public funding agencies has decreased dramatically since the beginning of the economic downturn in 2008. The Arizona Commission on the Arts is receiving 60% less funding from the state of Arizona, the Phoenix Office of Cultural Affairs is receiving 72% less funding from the city, the Tucson Pima Arts Council is seeing a 70% reduction in their funding, and Flagstaff Cultural Partners are down 5%.

2. Purchasing, ticket sales, memberships, and contributions from individuals are down.
3. Corporate and foundation support has decreased because invested income in both of these areas of support has decreased; income from corporate giving programs has also declined.

These three areas of cutbacks and change have had a profound impact on both the for-profit and non-profit arts industry in our state. Add in the rising costs of doing business, increasing health care costs levied on small business owners for their employees, and an overall downturn in tourism, and the full impact is real, substantial, and increasing—especially among Arizona non-profit organizations, which are already undercapitalized.

The Great Recession has been painfully difficult for the Arizona arts industry. In FY2009 and FY2010, organizations reported decreases of nearly 80% in contributed income; additionally, there have been notable decreases in ticket sales and significant job losses in the industry. Already-meager arts programs in many schools have been further reduced or eliminated altogether and artists have faced the termination of critical grant programs and services.

Similarly, the downturn forced the Arizona Commission on the Arts to do more with less, or—more accurately—*to do better* with less. In three years, the Commission has lost one-third of its staff, nearly 60% of its budget. Agility has become a significant asset as reductions to available grant funding created other, acute needs in the sector: for technical support, counsel, accountability training, and crisis management guidance. In addition, the Arizona ArtShare Endowment of $20 million, which was built with public funds over a 10-year period by legislative action, was eliminated completely by similar legislative decree in fiscal year 2010. There are currently no plans for renewing those lost funds.

The Impact of the Economy on the Arizona Arts Industry

The Arizona Commission on the Arts has aggressively sought to understand the effects of the economic downturn on the statewide non-profit arts industry. To that end, three surveys were administered to Arts Commission grantees large and small, and were analyzed by agency staff. Data gathered from the May 2009 survey provided substantial insight into the challenges Arizona nonprofits are experiencing in the areas of contributed income and fundraising; earned income, ticket sales, and admissions; endowments; and full- and part-time staffing.

Contributed Income and Fundraising: Results showed that 74% of organizations reported a decrease in contributions at this point in their season or fiscal year. Organizations are experiencing at least a 10-30% decrease in both attendance to fundraising events and in revenue generated at those events.

Earned Income, Ticket Sales, and Admissions: The survey indicated that 59% of respondents are experiencing a decrease in the sales of season subscriptions or memberships, and 51% are experiencing a decrease in single-ticket sales or the sales of participant entry fees for events or programs.

Endowments: Some 24 organizations (15% of respondents) have an endowment fund. Of these respondents, four organizations (17%) reported having already made use of part of their endowment principal as a way to address financial issues.

Full-Time and Part-Time Staff: Among those surveyed, 86 organizations (54% of respondents) reported employing full-time staff at the time of survey completion. Some 112 organizations (71% of respondents) reported employing part-time staff. Of the responding organizations with an annual operating budget of $250,000 or greater, 38% have made staff layoffs in the past 6 months, while 25% are using staff furloughs, and 50% have enacted hiring freezes. Sixty-three percent of the survey's respondents have reduced contract services, such as janitorial, print services, design, and other business-related services.

The survey also asked respondents to indicate how many staff members their organization has had to lay off because of the economy. According to this survey, 133 people lost their jobs.

Speaking with organizations and constituents on a regular basis leads the Commission to believe that these numbers represent only the beginning of job losses in the Arizona arts industry, particularly because the survey also indicates that 50% of respondents intend to reduce contract services in response to economic challenges. Since arts organizations often depend upon the contracted services of individual artists in education programs, creative services, production management, design elements, and more, additional losses in employment opportunities as budgets contract, are anticipated.

Response to the Economic Crisis

As disheartening and debilitating as the economic news has been and continues to be, the ACA's arts partners' fiscal responsibility has responded to the current economic calamity. Ninety-three organizations (59% of respondents) report having reduced their operating budget for the current year. The percentage of reductions made to current year operating budgets ranges from 3-80%. Survey results indicate that the average budget reduction among arts organizations for the current year is between 20% and 30%.

For organizations without paid staff, 61% of respondents reported that they would be forced to cut back on programs and/or exhibitions. The second most common effect that loss of public funding would have on organizations without paid staff is cuts in arts education programs.

Effects on Programming, Artistic Product, or Services

In addition to reporting on overall budget reductions and instability in the areas of endowments, personnel, fundraising, and earned income, the survey respondents report on the effects that the economy is having on the way their organizations plan and carry out programming and on how they develop and share artistic products or services.
These findings from survey respondents seem particularly noteworthy. They report that their organizations are:

- Delaying new programs
- Struggling to maintain high-quality productions with severely reduced budgets, sometimes leading to exhibits that are more regional in nature

- Offering drastically reduced ticket prices
- Decreasing numbers of programs, thus reducing employment
- Presenting less-expensive shows
- Reducing instructor compensation
- Presenting safer, less-risky productions with smaller casts
- Cutting arts-in-education programs for the current season
- Cutting free musical education concerts for young people
- Cutting outreach programs

The Canary in the Coal Mine: Understanding the Needs of Individual Artists

The strength of any arts industry is directly related to the health of its professional and avocational artists. Issues of fair compensation, a livable salary, health insurance, and affordable living and workspace continue to be at the forefront of any healthy artists' community. Arizona is no different. Often, urban centers that have the capacity to attract and keep artists are able to do so because of existing arts service groups, professional paying jobs, a critical gallery and museum scene, paying media and theatrical opportunities, and a strong writing community. Nevertheless, with changes in how individuals work and the growth of technology, Arizona sees artists living and expressing themselves throughout our state.

Artists working in the visual, literary, performing, and media arts are the major contributors to any state's arts industry. That contribution is no different in Arizona; these individuals strengthen the economic, educational, and civic vitality of our cities, large and small. They teach our children, they sing in and direct our choirs at temples and churches, they write the stories that document our lives and history, and they lead the band down Main Street on the Fourth of July.

Artists are—by their nature—information providers; they hold unique abilities to shed new light and understanding on issues, especially in these challenging times. This ability is, of course, not new; the arts have always taken the lead in facing the tough issues head on. From Picasso's painting *Guernica* to the poems of Langston Hughes, the arts are not shy, quiet, or reserved.

Mexican printmakers took on the atrocities of World War II through their work long before artists from any other country stepped forward. Photographers showed the effects of The Great Depression in our cities and in rural America, alike. Artists then went on to rebuild America as workers in the Works Progress Administration, the Federal Art Project, and the Civilian Conservation Corps.

To briefly summarize national trends, artists recorded and influenced the civil rights movement with their 8mm cameras, typewriters, and songs. They documented the farm workers' movement through photography and helped America understand the AIDS pandemic through stories, quilts, and images that spoke to our citizens when governments and the medical industry were silent. Lately, writers sponsored by the National Endowment for the Arts have worked with veterans as they have returned home, providing writing workshops as

means to working through personal experiences from war. Additionally, many artists in Arizona and across the country have stepped into the public arena to voice their beliefs regarding immigration legislation. Organizations such as Poets Responding to SB 1070, Alto Arizona Art Campaign, and others have added an artistic voice to the national debate on immigration and the migration of people.

Judilee Reed, the executive director of Leveraging Investments in Creativity, writing for Grantmakers in the Arts, provides the following highlights in her 2010 report, *Artists and the Economic Recession Survey: Selected Findings* related to artists and the industry, generally nationwide:

Income: Most artists have relatively low incomes, even though 62% are college educated and hold at least one additional job. Two-thirds said their total income in 2008 was less than $40,000, and nearly one-third of them earned less than $20,000. Artists typically earn either very little of their income from their artwork or almost all of it. Artists who spend more than 80% of their time on their artwork have the highest income levels, while artists who rely on cobbling together an income from a mix of sources are more likely to earn less than $20,000 a year. Some 51% of artists reported a decrease in their art-related income from 2008-2009, including 18% who saw it decrease by 50% or more.

Day Jobs: Sixty-six percent of artists hold at least one job in addition to their artistic practice, while 21% hold two or more additional jobs. Fifty-nine percent of artists with other jobs are employed in arts-related fields. Half of artists who work in arts-related fields work in academics, commercial arts (43%), and non-profit arts (42%). One-third of artists who work in non-arts related jobs have also seen their incomes decrease over the past year.

Recession Concerns: Seventy-seven percent of artists' number one worry is loss of income, 70% cite fewer sales, 67% say difficulty finding funding for future projects, 61% indicate rising amounts of debt, 59% report fewer exhibition/presentation opportunities, 59% have received fewer grants, and 59% cite low morale for themselves and others they know. Artists who earn most of their income from art are more likely to be worried than those who earn almost none of their income from art.

Despite those data, the report indicates that 75% of the artists believe this is an inspiring time to be a working artist. Four out of 10 say that the ability to spend more time on their artwork is a positive outcome of the recession, and 32% say they experiment more and are more open to collaboration.

Arts Education: Building our Future

A report published by the National Assembly for State Arts Agencies in collaboration with the Arts Education Partnership: *Critical Evidence: How the Arts Benefit Student Achievement*, demonstrates that children receiving art instruction as part of their education have greater success in reading, mathematics, critical thinking, and social skills, and are more likely to stay in school.

The recent census report *Engaging Students, Supporting Schools, Accessing Arts Education: Highlights from the Arizona Arts Education Census Project*, a remarkable dichotomy is revealed. On one hand, we know that there are opportunities for students across the state to access arts education programs, but on the other hand limited or no funding exists to support these programs. Some of our Arizona children are attending schools where they receive limited arts education, and in some cases they receive none at all. The report shows clearly that the arts make a difference, and that the lack of the arts has a negative impact.

Highlights of the report—which also includes recommendations for parents, educators and students as well as for policy changes and adaptations—include:

- 87% of students have access to some dance, music, theater, or visual arts in their schools
- 55% of schools provide the required instruction in music and visual arts while 21% reported no arts classes or courses for students
- 90% of schools with music and 76% with visual arts use Certified
- Arts Specialists
- 56% of schools have updated curricula reflecting the Arizona Academic Arts Standards
- Only 39% of high schools weigh arts courses equally with other academic subjects, and only 12% weigh advanced arts courses equally with other advanced academic courses
- General music and art are most popular in elementary and middle schools, and general art and dance are most popular in high schools. More high school students are enrolled in dance than are enrolled in band, orchestra, or theater
- Charter schools are significantly less likely to provide arts courses for students or have highly qualified teachers providing instruction than district schools

Perhaps most significant of all, more than 134,000 Arizona students attend schools every day with no access to arts education taught by a highly qualified teacher.

There are positive aspects of the census, but all too often, our young people are not getting the full breadth of arts education mandated in Arizona state policy. Some feel our schools are focused on teaching toward the test and are mired in federal mandates. Testing requirements can skew priorities (for instance, the AIMS test does not measure the arts). Budget issues always play a role in selecting course work as well; indeed, the census revealed that on average 1/2 a penny per pupil per day is spent on arts education supplies.

If local school boards are composed of individuals who themselves never had a solid arts education, they may not personally appreciate the value of a well-rounded education that includes study in the visual, literary, and performing arts. Therefore, our current arts education situation may be setting our state's broader civic progress up for failure.

Indeed, if this trend is not reversed, we fear we may continue to see young people failing to graduate from high school and to send fewer on for post-secondary education. We are concerned that many leave our education system poorly prepared to face the challenges of today's domestic workplaces and globally focused economies.

A Time to Plan: Creating a New Standard of Service

The Arizona Commission on the Arts is a 44-year-old agency of the State of Arizona, governed by a 15-member, Governor-appointed board. The agency is one of 56 state and jurisdictional agencies throughout the country. Every state in the Union has a state arts agency. The Arts Commission receives its funding from the State of Arizona and the National Endowment for the Arts, with some support through partnerships with corporations and foundations. The Commission delivers grants, programs, and services to every legislative district in support of Arizona's state arts industry. Its mission guides them in that service: *We imagine an Arizona where everyone can participate in and experience the arts*.

While imagination is, indeed, a key component of realizing ACA's mission of preserving a vital and vibrant arts environment in Arizona, the Commission has necessarily extended that imperative. In order to develop a critically thoughtful and nimble plan for the future of Arizona's arts industry and of the Commission itself, our staff and members engaged Arizonans in qualitative and quantitative research through community listening sessions, surveys, and literature reviews to develop a four-year strategic plan titled *Building an Artistic Future for Arizona*.

Listening Sessions: Nine locations hosted community, town hall-type listening sessions: Flagstaff, Lake Havasu City, Mesa, Show Low, Surprise, Tubac, Tucson, Yuma, and Chandler. Sessions were open to all interested participants and registered on a statewide public meeting calendar in compliance with Arizona law. Regional partners—including local arts agencies, city parks and recreation departments, and local businesses—helped host meetings and assist with promotion.

Surveys: A strategic planning survey was developed for the Arts Commission's broadest constituency—contacts within the agency mailing list and grantee database—about the impact of the arts in their work and personal lives. This survey was promoted on the agency website and blog, through email invitations and social media, and with help from the statewide partners that hosted listening sessions. Targeted survey instruments were developed for artists, arts educators, and arts administrators, as well as groups typically under-represented in arts sector planning: city managers and mayors, faith leaders, coordinators of faith-based arts programs, and high school and college students.

Listening Sessions and Survey Results

The Arts Commission's work helps inform key stakeholders of the challenges, barriers, and opportunities facing the Arizona arts industry. Participants overwhelmingly expressed a need for additional funding resources, both earned and contributed. The need for both financial and dedicated programmatic support for arts in education activities during and after the K-12 school day was a primary concern.

The need for a statewide visibility and outreach campaign to showcase arts opportunities in communities across the state and to build public value for the arts is critical. Participants in the survey and those attending the listening sessions clearly understand the need to inform

elected officials about the value of the arts in education, as an economic driver, and as a community development tool. Finally, constituents said they needed more professional development and training.

Building an Artistic Future for Arizona was developed in partnership with the Arizona arts industry—in an effort to rally artists, educators, administrators, and advocates behind a cohesive set of strategies to advance the collective cause. The plan does not simply detail how the Arts Commission intends to move the industry forward, but outlines how the Commission believes it can improve the industry's circumstances altogether.

The plan represents a cohesive set of strategies to advance a collective cause: stability and progress for the Arizona arts industry. *Desired Outcomes* are developed as ideal results for the entire Arizona arts industry:

1. Arizonans can access vibrant, quality arts and cultural activities wherever they live, and have opportunities to participate as practitioners, professionals, patrons, donors, and volunteers.

2. Arizona residents can make healthy livable wages working in myriad facets of the arts. Their contributions are valued and respected.

3. Students have access to quality, robust arts education programs in Arizona schools. In-school arts opportunities are enhanced by meaningful opportunities in out-of-school and community settings.

4. Arts and cultural programs and organizations are considered societal cornerstones and are employed as partners in the revitalization and sustainability of streets, neighborhoods and communities.

5. Recognizing the arts industry's role in economic viability and enhanced quality of life, Arizona's for-profit businesses invest in the arts as partners, supporters and champions.

In response to constituent recommendations, the *Building an Artistic Future for Arizona* Strategic Plan FY2011– FY2014 contains a promotional campaign for the arts in Arizona meant to advance the cultural conversation, build public value for the arts, and develop a privately held funding stream (Figure 2.1).

The campaign is meant to:

- Advance the cultural conversation in Arizona
- Grow public understanding about the broad-spectrum benefits of arts programs and increase arts participation in Arizona communities
- Fortify the privately held Arizona ArtShare Endowment, whose funds can be used to support statewide arts programs.

The campaign was launched on December 1, 2010 in programs of performing arts organizations and print media throughout the state (Figure 2.1). Further, the campaign was released through a number of social networking programs including Facebook and Twitter. All of the materials direct individuals to an interactive website: www.thechoiceisart.org.

Figure 23.1

The message is direct, personal, and pragmatic:

- We want **mayors** to be as proud of their community theatre and their museums as they are of their banks, their hospitals, their shopping malls, and their corporate centers.
- We want our **legislators and congressional leaders** to know that public funding for the arts is a good thing, a responsible action, and a smart move for increasing economic development, community growth, and cultural understanding across Arizona and our country.
- We want **parents** to understand that filling their vans with kids to take them to **music lessons and theater camp** is as important as taking them to the soccer fields and the swimming pool.

- We want **parents** and **grandparents** to challenge their school boards, superintendents, and principals to make sure the **arts have a place in their child's education**.
- We want **neighbors** to be proud of the fact that living next door to them is a **painter**, an **actor**, a **musician**, a **poet**, or a **dancer**.

Much of what you've just read—from the reports of cultural and economic loss in our state to the Commission's research activity and plans for renewal—can only begin to be re-visioned Arizona's citizens. Take a moment, now, to recall how you have interacted with the arts. Remember occasions when the arts have positively influenced your life, your education, your development as a businessperson, as a volunteer, as a citizen. Do you still remember a line of that poem you memorized? Where did you see your first play? Who taught you to dance? These memories of arts-infused moments are, indeed, powerful for all of us. With only the slightest variations, the moments are universal. Further, the value of the arts comes from these special moments. It's intrinsic to them, rather than instrumental or easily calculable. The arts moments you've just recalled are the soul-touching, cathartic moments that everyone experiences. Simply, they're the kinds of moments that are more human, more vulnerable, more powerful—and more lasting—than any statistics, quotations, or analysis could ever hope to be. Then. And now. And always.

Robert C. Booker is the Executive Director of the Arizona Commission on the Arts. Prior to joining the Commission Booker was the Executive Director of the Minnesota State Arts Board. His work for the Commission is focused on building a statewide arts industry that serves the residents and visitors of Arizona, grows programs in arts education, increases cultural tourism, and expands the careers of working artists in all disciplines. Booker received the Lifetime Achievement Award from the Minnesota Crafts Council in 2005 and was recognized for his national leadership by the National Assembly of State Arts Agencies with the 2006 Gary Young Award. Bob serves as a member of the Arizona Governor's Centennial Commission, Co-Chair of the Arts and Culture Committee of the Arizona Mexico Commission, Arizona Historical Advisory Commission, a trustee of the Western States Arts Federation, and a board member of Grantmakers in the Arts. Booker served as President of the board of the National Assembly of State Arts Agencies, as a member of the Minnesota Governor's Quarter Dollar Commission, and was the Chair of the Minnesota Governor's Residence. Booker has served on the boards of Arts Midwest, Minnesota Museum Educators Association, the Cable Arts Consortium, Arts Over AIDS, and the Minnesota AIDS Project. Booker is a painter and art collector.

Selected Resources on Arts and Culture

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Electronic Resources

Americans for the Arts: http://www.artsusa.org/

> Americans for the Arts is the nation's leading nonprofit organization for advancing the arts in America, and is focused on four primary goals: 1. Lead and serve individuals and organizations to help build environments in which the arts and arts education thrive and contribute to more vibrant and creative communities; 2. Generate meaningful public and private sector policies and more leaders and resources for the arts and arts education; 3. Build individual awareness and appreciation of the value of the arts and arts education; 4. Ensure the operational stability of the organization and its ability to creatively respond to opportunities and challenges. Their reports have included: *Arts and Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and their Audiences*. (2009) and *Creative Industries Comparative Reports* (2010).

Arizona Commission on the Arts: http://www.azarts.gov/

> One of 56 state and jurisdictional arts agencies, the ACA supports a statewide arts network whose mission is to create opportunities for all Arizonans to participate in and experience the arts. They deliver grants and support to cultivate sustainable arts communities and promote statewide public access to arts and cultural activities.

Arizona Humanities Council: http://www.azhumanities.org/

> The AHC creates opportunities for sharing diverse stories through critical thinking and public discussion, to better understand and appreciate one another, so that we can make informed decisions about our collective future. Founded in 1973, the AHC is a non-profit organization and the Arizona affiliate of the National Endowment for the Humanities. The AHC is not a state agency. The AHC supports public programming in the humanities that promotes understanding of human thoughts, actions, creations, and values.

The Arts and Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the City of Phoenix, AZ. (Washington, D.C.: Americans for the Arts, 2007): http://phoenix.gov/ARTS/aep3.pdf

Foundation Center: Focus on Funding for the Arts: Arts Funding by Location (interactive map): http://maps.foundationcenter.org/arts/FldIntUS.php

> Distribution by location of 20,733 grantmakers funding arts and culture. Categories: Arts (general), Historical Activities, Humanities, Media/Communications, Multipurpose Centers/Programs, Museum, Performing Arts, Visual Art. Click on map to bring up individual counties, then click on individual counties to bring up specific grantmakers and amounts. Arizona ranks # 28: 191 grantmakers; Coconino (4),

Yavapai (3), Maricopa (139), Pima (39), Yuma (1), Santa Cruz (4). Top five states: New York: 3373, California: 2119, Illinois: 1152, Texas: 1111, Florida: 1009.

Maricopa Partnership for Arts and Culture (MPAC). MPAC ceased operating in March 2010, but its reports are available on the website of the Virginia G. Piper Charitable Trust: http://www.pipertrust.org/publications/programspecificpubs.aspx

- *A Place for Arts and Culture* (2003)
- *Arizona Needs Arts and Culture—Education* (2009)
- *Arizona Needs Arts and Culture—Economic Diversity* (2009)
- *The Arts in Arizona Report* (2002)
- *Arts, Culture and the Latino Audience* (2008)
- *Comparative Research on Dedicated Public Funding Models for Arts and Culture* (2007)
- *Creative Connections: Arts Ideas and Economic Progress in Greater Phoenix* (2006)
- *Cultural Participation Study for Maricopa County* (2007)
- *Maricopa Arts and Culture SWOT Analysis* (2003)
- *Maricopa Arts Benchmark Report* (2003)
- *Metro Phoenix DNA Initiative* (2008)
- *Metro Phoenix DNA Roadmap (2008)*
- *Perceptions Matter: Attracting and Retaining Talented Workers to the Greater Phoenix Region* (2007)

Morrison Institute for Public Policy, Arizona State University: http://morrisoninstitute.asu.edu/

Established in 1982, the Morrison Institute for Public Policy is unit within the School of Public Affairs in the College of Public Programs. Examining critical Arizona and regional issues, its research has served as a catalyst for public dialogue and aims to help improve the state's quality of life. Its mission is to conduct timely, applied analysis that informs, advises, and assists Arizona's state and community leaders, and its nonpartisan research explores public policies that impact greater Phoenix, the State of Arizona, and the nation. Through publications and forums, its research serves the public officials, private sector leaders, and community members who shape public policy. The Morrison Institute has conducted important work on topics that span education reform, water resources, health care, human services, urban growth, government structure, arts and culture, technology, quality of life, public finance, environment, sustainability, and economic development. Publications include *How Arizona Compares: Real Numbers and Hot Topics* (Arizona Policy Choices, 2005; The publication offers comparative data and analysis on 10 public policy issues, including Arts and Culture); *Vibrant Culture—Thriving Economy: Arts, Culture and Prosperity in Arizona's Valley of the Sun* (Summary Report of the Maricopa Regional Arts and Culture Task Force, 2004); *What Matters: The Maturing of Greater Phoenix, Fourth in the Series of Indicators of Our Quality of Life* (Section 9: Arts, Culture and Recreation), (2004); and *A Place for Arts & Culture: A Maricopa County Overview* (2003); and "How Do Arizonans Spend their Personal Time?" *Arizona Views* (Arizona Indicators Panel), Volume 1, Issue 1, (October 2008): 1-6.

National Assembly of State Arts Agencies: http://www.nasaa-arts.org/

The National Assembly of State Arts Agencies (NASAA) is the membership organization that unites, represents, and serves the nation's state and jurisdictional arts agencies. Each of the 56 states and jurisdictions has created an agency to support excellence in and access to the arts. NASAA's mission is to strengthen state arts agencies. We represent their individual and collective interests, empower their work through knowledge, and advance the arts as an essential public benefit. We fulfill our mission in three ways. Knowledge: NASAA facilitates the transfer of ideas, helping state arts agencies to pioneer, share, and apply knowledge about serving the public effectively. NASAA's research and education services inform and inspire, empowering public sector leadership for the arts in every state. Representation: NASAA provides national representation for state arts agencies, ensuring that their policy and resource interests have a persuasive voice. NASAA advances the value of state arts agencies, bringing visibility and recognition to their accomplishments. NASAA also champions the arts and state arts agencies, advocating for a robust public sector role in American cultural life. Community: NASAA connects state arts agency staff and council members, making the collective experiences and wisdom of the field a resource for everyone. NASAA embraces both the differences and similarities among states, widening understanding, and creating common cause. Participation in a rewarding and welcoming professional community strengthens state arts agencies in all corners of the country. NASAA publishes a *Public Funding Sourcebook* (1970-present).

See also, *Critical Evidence; How the Arts Benefit Student Achievement* (2006): http://www.azarts.gov/wp-content/uploads/2010/12/Critical-Evidence.pdf

National Endowment for the Arts: http://www.nea.gov/

The NEA was established by Congress in 1965 as an independent agency of the federal government. To date, the NEA has awarded more than $4 billion to support artistic excellence, creativity, and innovation for the benefit of individuals and communities. The NEA extends its work through partnerships with state arts agencies, local leaders, other federal agencies, and the philanthropic sector.

Art Works: The Official Blog of the NEA: http://www.arts.gov/artworks/

National Endowment for the Humanities: http://www.neh.gov/

The NEH is an independent federal agency created in 1965. One of the largest funders of humanities programs in the United States, it is dedicated to supporting research, education, preservation, and public programs in the humanities. Because democracy demands wisdom, the NEH serves and strengthens our Republic by promoting excellence in the humanities and conveying the lessons of history to all Americans. The Endowment accomplishes this mission by providing grants for high-quality humanities projects in four funding areas: preserving and providing access to cultural

resources, education, research, and public programs. NEH grants typically go to cultural institutions, such as museums, archives, libraries, colleges, universities, public television, and radio stations, and to individual scholars. NEH grants strengthen teaching and learning in the humanities in schools and colleges across the nation, facilitate research and original scholarship, provide opportunities for lifelong learning, preserve and provide access to cultural and educational resources, and strengthen the institutional base of the humanities

Otis Report on the Creative Economy of the Los Angeles Region: The Power of Art and Artists (Los Angeles: Otis College of Art and Design, 2010). This is the fourth Otis report (the first was in 2007): http://www.otis.edu/creative_economy/

The NEA blog on the Otis report headlined: "Creativity is Serious Business." http://www.arts.gov/artworks/?p=4937
Using 2009 data, the report demonstrates once again that creativity is serious business in Southern California. Even in these challenging economic times, the creative economy is one of the largest business sectors in the region, second only to tourism and hospitality. In 2009, the arts, design, and entertainment industries together supported one in six jobs in the area, generated $127 billion in sales revenues, and were the source of $4.6 billion in state and local tax revenues. These regional findings make a national case. They put real numbers to the economic contributions of creative professionals and enterprises. Furthermore, the Otis Report data affirm that the 21st century is an age of ideas, in which creativity provides a long-range and sustainable competitive edge for the U.S. economy. Despite manufacturing downturns due largely to regional outsourcing of low-skill jobs, creative sector employment is projected to grow faster than in other sectors over the next five years and especially for high-skill creative jobs. Creativity stays onshore; innovation cannot be outsourced. Hard data are but one way to substantiate the economic impact of creativity. In his keynote remarks at the Otis Report release event, NEA Chairman Rocco Landesman made a most compelling statement: "Artists are placemakers. When you bring arts organizations and arts workers into a neighborhood, the place changes to a vibrant and sustainable community. The arts complement and complete other sectors of the economy." Through this broader lens, the data in the Otis Report are more than the facts of creativity's economic impact; they are the story of possibilities made real by a combination of education, talent, entrepreneurial drive, and opportunities. The lives, work, and achievements of creative professionals, such as Otis alumni, illustrate the power of the arts and artists in our economy, culture, and communities. Their impact and contributions cannot be taken for granted. Vibrant creativity in the U.S. requires careful investment—as envisioned by the "Art Works" agenda of NEA.

Western States Arts Federation (WESTAF), Denver, Colorado: http://www.westaf.org/

WESTAF is a non-profit arts service organization dedicated to the creative advancement and preservation of the arts. Their website includes a blog, as well as annotated arts links to resources on accessibility, arts education, folklife, international arts, literary arts, media, presenting and touring, state and regional arts

agencies, and the visual arts. As part of WESTAF's mission to strengthen the financial, organizational, and policy infrastructure of the arts in the West, WESTAF regularly undertakes research projects on behalf of our member arts agencies and the general arts community. The results of our research are usually presented in position papers, many of which are available to the general public upon request. Papers have been completed on such topics as: economic arguments for the public funding of the arts; opportunities for collaboration among cultural agencies; background information concerning the development of cultural trust legislation; and an assessment of the effectiveness of legislative arts caucuses in advocating for the arts.

Appendix B:

Poetry and Art: Information and Biographies

The art works that appear on the front and back covers, as well as those reproduced within the report, reference broader issues that transcend the Arizona's cultural community. Janet Echelman's *Her Secret is Patience* (2009), on the cover, speaks to Arizona's national leadership in the realm of public art. It is a signature piece of an ambitious vision for the revitalization Phoenix's downtown, bolstered by ASU's downtown campus and the light rail system, which opened in December 2008. On the back cover is a work by Matthew Moore. He is the last of four generations of farmers in the West Valley, and his "Urban Plough" series suggest the collision of suburban expansion and development with the state's traditional agricultural base. The photograph by Mark Klett and Byron Wolfe references a rich landscape history, as well as the fact that with the Santa Fe Railway and the Fred Harvey Company, it was artists who helped both to make the Grand Canyon grand and to sell the Southwest to cultural tourists. Tiffiney Yazzie is a young Navajo photographer, and her image of a shelf of books on Navajo culture records what are widely regarded as important publications on the subject, but whose authors are are largely White. D. Bryon Darby dramatically visualizes the dynamic growth of Arizona's transportation hubs in his riveting image of seventy flights landing at Sky Harbor Airport in a ninety-minute time span. The tile mural by Cristina Cárdenas of Tucson is embedded in a long tradition of Latina art in the state of Arizona and has deep links to the Mexican muralists. Cowboy poetry by Carole Jarvis and Scott Baxter's photograph of Sam Udall at the Y Cross Ranch references an important part of Arizona's heritage.

Scott T. Baxter has been a professional photographer for over twenty-five years. His documentary projects include photographing the indigenous peoples of Chiapas, Mexico. Project Statement: "100 Years 100 Ranchers" coincides with Arizona's 2012 Centennial and documents 100 Arizona ranchers whose families have been ranching in Arizona since 1912 or earlier. I have always been drawn to people. Regardless of the setting, the human element in a photograph will always give one a sense of place and perspective. The ranching tradition in Arizona is enduring and important, even more so as conditions such as encroaching development, drought, and dire economic conditions have made a difficult way of life even more tenuous. Disputes over water rights, grazing fees, and recreation have also deeply affected the ranching way of life. The intense demanding work involved in running a ranch has led some children to choose not to stay on and pursue this life. Ranchers love what they do, and cherish the land and tradition that has been passed down to them through their f amilies. My goal is to recognize the families that have struggled to survive and persevere in these challenging times. As ranches are lost to developers and poor economic conditions, my work preserves photographically an integral part of Arizona's tradition and history. I work with black and white large format film as a monochromatic study effectively portrays the spirit of this unique group of Arizonans. Working with large and medium format film slows down the process and allows me to engage my subjects in a more personal, less detached manner. I travel to each rancher's headquarters in order to get to know each individual and their operations.

Cristina Cárdenas was born in Guadalajara, Jalisco, Mexico, where she studied architecture at the Instituto Tecnológico de Estudios Superiores de Occidente (ITESO). Cárdenas pursued further training at the Universidad de Guadalajara under Francisco Caracalla and Jorge Martínez, former assistants to muralist José Clemente Orozco. Her draftsmanship, iconography, artistic forms, color, and styles are derived from Mexican neo-figurative expressionism in combination with the academic training she received in the United States, where she studied painting and printmaking with Luis Jimenez, Robert Colescott, Bruce McGrew, and Bailey Doogan at the University of Arizona. Cárdenas earned a Master of Fine Arts degree in printmaking in 1990, and has lived and worked in Tucson for over two decades. Her large and small-scale paintings, lithographs, and monoprints disrupt stereotypes of gender, religion, and culture. More recently she has incorporated photographs and digital images of historical subjects and self-portraits in works on fine art paper and wood panel surfaces. For the last decade, she has also used bark/amate paper produced by the Otomi Indians of San Pablito, Puebla, Mexico. A textured bark paper made using pre-Hispanic methods, amate provides a historical link to her Mexican indigenous roots. Cárdenas combines amate with assorted media such as acrylic and gouache paints, dry pigments, gold leaf, and printmaking techniques. She uses modern techniques on ancient surfaces to create new representations of female archetypes derived from classical Mexican antiquity, contemporary interpretations of female saints, and intimate (auto)biographical portraits of womanhood and motherhood. Her work also explores the experience of unnamed or unknown immigrant subjects from the perspective of a woman artist born in Mexico who lives in a border zone. Her art engages the simultaneous challenges of belonging to a cultural community and forming an individual identity.

D. Bryon Darby has been photographing the ever-changing landscape of the West for the past decade. A life-long inhabitant of the desert, Bryon was raised in Northern Utah where he received a Bachelor of Fine Arts in graphic design from Utah State University. Since completing his undergraduate degree in the spring of 2001, Bryon has supported himself as a commercial artist in the advertising and editorial fields. Presently, he is working on a public art commission with the Phoenix Office of Cultural Affairs while finishing his Master of Fine Arts in Photography at Arizona State University. His current work explores ideas about the power of place on personal experience while expanding on notions of culture and landscape.

Janet Echelman reshapes urban airspace with monumental, fluidly moving sculpture that responds to environmental forces including wind, water, and sunlight. In 2010, she premiered *Water Sky Garden* at the Vancouver Olympic Winter Games, and in 2009, she completed the largest public art commission in the United States that year, *Her Secret is Patience*, in Phoenix. This sculpture was recognized by a Public Art Network, Year in Review Award that same year. Her art has been presented in Spain, Italy, Portugal, Lithuania, India, Japan, Indonesia, Hong Kong, Canada, Mexico, and the United States. She graduated from Harvard and completed graduate degrees in psychology and painting. About the art work: Suspended above the two-city-block Civic Space Park, the sculpture is monumental yet soft, fixed in place but constantly in motion, it dances gently in the air, choreographed by the flux of desert winds. The large three-dimensional multi-layered net form is created by a combination of hand-baited and machine-loomed knotting, and is the result of a collaborative effort with an international team of award-winning aeronautical and mechanical engineers, architects,

lighting designers, landscape architects, and fabricators. This work redefines the "art space," by bringing viewers' eyes upwards to the sky, focused on a new celestial object. During the day, the sculpture hovers high above heads, treetops, and buildings. The sculpture projects what the artist calls "shadow drawings" onto the ground, inspired by Phoenix's cloud shadows that captivated the artist from her first site visit. At night, the illumination program changes color gradually through the seasons. Using 20 high-intensity metal halide fixtures at five separate locations, a range of blue and magenta dichroic glass lenses were combined to enhance without overpowering the richness of the net's integrally-colored polyester fiber. The lighting design also changes what portion of the sculpture is illuminated, leaving parts obscured in mystery, much like the phases of the moon. When traveling to Phoenix for the first time, the artist was "mesmerized by the broad, open sky that seemed to stretch endlessly." She said she was drawn to Arizona's distinctive monsoon cloud formations, "the shock of desert winds, whirls of dust, the crash of lightning, and that luminous blue turning to violet and orange, then velvety blue-black." She was also inspired by the structure and pace of desert flora. "I'm moved by the exertion of the Cereus, a spiny cactus putting down roots in search of water in the desert, her patience in saving up every ounce of energy until, one night, in the middle of the cool darkness, she unfurls one succulent bloom," said the artist. Another source of inspiration was the local fossil record, which geologists confirmed evidence that this site was once an ocean filled with marine life. The title comes from a quote by American poet philosopher Ralph Waldo Emerson, who wrote "Adopt the pace of nature; her secret is patience."

Carole Jarvis, who lives on a desert ranch in Forepaugh, near Wickenburg, is the author of *Time Not Measured by a Clock: Cowboy Poetry from the Life of a Cowboy's Wife* (2003). In 2001, she was the recipient of the Gail I. Gardner Award for a Working Cowboy Poet at the Arizona Cowboy Poets Gathering in Prescott and the 2003 Western Heritage Award at the 15th Annual Cowboy Christmas Poetry Gathering in Wickenburg. As a young girl growing up in southern California, she dreamed of "a ranch, a cowboy, and a horse." Her dreams came true in Jackson Hole, Wyoming, when she met a handsome cowboy named Dan Jarvis, whom she married in 1957. For 53 years, they lived and cowboyed in Wyoming, Oregon, and Arizona, sharing a life of hard work, horses, and freedom in the beautiful landscape of the American West. Carole remains active on the cowboy poetry circuit, where her poems honor the heritage of the rangeland and the men, women, horses, and cattle who have worked it for generations. As she said in one poem: "I'm glad I still live where there's cowboys."

Mark Klett is Regents' Professor of Art at Arizona State University in Tempe. Trained as a geologist, Klett photographs the intersection of culture, landscapes and time. He established his artistic perspective on the American West landscape as the chief photographer for the Rephotographic Survey Project (1977-79), which re-photographed Western sites first captured by surveyors in late 1800s. Since then, Klett has authored 13 books, including his most recent works, *Saguaros* (Radius Press and DAP, 2007), *After the Ruins* (University of California Press, 2006), *Yosemite in Time* (Trinity University Press, 2005) and *Third Views, Second Sights* (Museum of New Mexico Press, 2004). He has received fellowships from the Guggenheim Foundation, the National Endowment for the Arts, the Buhl Foundation, and the Japan/U.S. Friendship Commission. Klett's work is exhibited, published and collected both nationally and internationally.

Matthew Moore is a fourth generation farmer whose land and life is quickly being overcome by suburban sprawl. He creates large site-specific earthworks on and around his family's land, which highlight the grounds on which the urban and rural collide and compete. Moore also works with video and installation art, addressing issues of ecological, cultural, and economical sustainability revealed through his artistic narrative regarding the potential loss of the romanticized American farm. Moore's work is a part of a traveling show about the contemporary American suburb for the Walker Art Center in Minneapolis, which is being curated with the Heinz Architectural Center at the Carnegie Museum of Art in Pittsburgh. Artist Statement: I am the last of four generations to farm my family's land. Within five years, my home (this land) will transform into suburbia. As a farmer and an artist, I display the realities of this transition in order to rationalize and document my displacement from the land on which I was raised. The trials and tribulations of American agriculture, its roles in contemporary globalization, and its questionable ecological practices create a foundation for my explorations. By displaying the past and future of the farm, I have used our land to explore similarities between commercial agriculture and suburbia, which reveal their social, cultural, and economic impacts locally, nationally, and internationally. Documenting the reality of land and appetite from agriculture to suburbia, the decisions of our society reveal consumer models that make us disobedient to our relationship with land and time. By exhibiting this theater of evolution and loss, I have entered a historical dialogue of displacement that reveals my part (in agriculture) in the transformation of my family's land and identity. Through my artwork, I look at these dilemmas that reveal the impact of the American dream on our society and the land as we transition towards a post agrarian nation.

Alberto Rios is a Regents' Professor at Arizona State University, and Katherine C. Turner Endowed Chair in English. He is the author of ten books and chapbooks of poetry, three collections of short stories, and a memoir. His books of poems include, most recently, *The Dangerous Shirt*, along with *The Theater of Night*, winner of the 2007 PEN/Beyond Margins Award, *The Smallest Muscle in the Human Body*, finalist for the National Book Award, *Teodoro Luna's Two Kisses, The Lime Orchard Woman, The Warrington Poems, Five Indiscretions, and Whispering to Fool the Wind*, which won the Walt Whitman Award. His three collections of short stories are, most recently, *The Curtain of Trees*, along with *Pig Cookies* and *The Iguana Killer*, which won the first Western States Book Award for Fiction, judged by Robert Penn Warren. His memoir about growing up on the Mexico-Arizona border, called *Capirotada*, won the Latino Literary Hall of Fame Award and was designated the OneBookArizona choice for 2009. Rios is the recipient of the Western Literature Association Distinguished Achievement Award, the Arizona Governor's Arts Award, fellowships from the Guggenheim Foundation and the National Endowment for the Arts, the Walt Whitman Award, the Western States Book Award for Fiction, six Pushcart Prizes in both poetry and fiction, and inclusion in *The Norton Anthology of Modern Poetry*, as well as over 250 other national and international literary anthologies. His work is regularly taught and translated, and has been adapted to dance and both classical and popular music.

Byron Wolfe is the David W. and Helen E.F. Lantis University Professor of Communication Design at California State University, Chico. Through photography and digital imagery, he reflects his deep and abiding interest in ideas about place, history, time, perception, representation, and personal experience. His work is the permanent collection of the San Francisco Museum of Modern Art; The Museum of Fine Arts, Houston; The Center for

Creative Photography, Tucson; The J. Paul Getty Museum, Los Angeles; and the Nelson-Atkins Museum, Kansas City, Missouri. He is the recipient of the Santa Fe Prize for Photography and a Guggenheim Fellowship. He has published three books: *Everyday: A Yearlong Photo Diary*, a photographic narrative about creative practice, place, change, and the meandering flow of life, and two collaborative projects—*Third Views, Second Sights: A Rephotographic Survey of the American West* (with Mark Klett et. al.) and *Yosemite in Time: Ice Ages, Tree Rocks, Ghost Rivers* (with Mark Klett and Rebecca Solnit). He received his M.F.A. from Arizona State University and his B.A. from the University of Redlands in Redlands, California.

Tiffiney Yazzie grew up in Chinle, Arizona. She is from the Yucca Fruit-Strung-Out-In-A-Line Clan and is born for the Salt People Clan. Her maternal grandparents are of the Towering House Clan of the Navajo Nation. She is currently pursuing her Bachelor of Fine Arts degree in Photography and Bachelors of Arts degree in Art History at the Herberger Institute for Design and the Arts at Arizona State University. She is a member of the ASU Student Photographers' Association and the Society for Photographic Education.

ARIZONA TOWN HALL PUBLICATIONS

Town Hall	Date	Subject
1.*	Oct. 1962	Arizona's Tax Structure
2.	Apr. 1963	Welfare Policies & Administration
3.*	Oct. 1963	Elementary & High School Education
4.	Apr. 1964	Arizona's Water Supply
5.*	Oct. 1964	Revision of Arizona's Constitution
6.*	Apr. 1965	Gearing Arizona's Communities to Orderly Growth
7.	Oct. 1965	Public Land Use, Transfer & Ownership
8.*	Apr. 1966	Crime, Juvenile Delinquency & Corrective Measures
9.*	Oct. 1966	Higher Education in Arizona
10.	Apr. 1967	Do Agricultural Problems Threaten Arizona's Total Economy
11.*	Oct. 1967	Arizona's Tax Structure & Its Administration
12.*	Apr. 1968	Mental Health & Emotional Stability
13.	Oct. 1968	Traffic & Highways
14.*	Apr. 1969	Civil Disorders, Lawlessness & Their Roots
15.	Oct. 1969	Economic Planning & Development
16.	Apr. 1970	The Future of Health & Welfare in Arizona
17.*	Oct. 1970	Preserving & Enhancing Arizona's Total Environment
18.*	Apr. 1971	The Arizona Indian People & Their Relationship to the State's Total Structure
19.	Oct. 1971	Alcohol & Drugs—Quo Vadis?
20.	Apr. 1972	Arizona's Correctional & Rehabilitation Systems
21.*	Oct. 1972	Arizona's Heritage—Today & Tomorrow
22.*	Apr. 1973	Adequacy of Arizona's Court System
23.*	Oct. 1973	Cost & Delivery of Health Care in Arizona
24.*	Apr. 1974	Land Use Planning for Arizona
25.	Oct. 1974	The Problems of Transportation: People & Products
26.*	Apr. 1975	Responsive & Responsible Government
27.	Oct. 1975	The Problem of Crime in Arizona—How Do We Solve It?
28.	Apr. 1976	Arizona Energy—A Framework for Decision
29.	Oct. 1976	Arizona's Economy—Yesterday, Today & Tomorrow
30.*	Apr. 1977	Of, By & For the People—How Well Is It Working?
31.	Oct. 1977	Arizona Water: The Management of Scarcity
32.*	Apr. 1978	Cost & Quality of Elementary & Secondary Education
33.*	Oct. 1978	Corrections in Arizona: Crisis & Challenge
34.*	Apr. 1979	Indians & Arizona's Future—Opportunities, Issues & Options
35.	Sept. 1979	Toward Tax Reform
36.	Apr. 1980	Arizona's Transportation Dimension
37.	Oct. 1980	Toward the Year 2000: Arizona's Future
38.	May 1981	Arizona's Hispanic Perspective
39.	Oct. 1981	Arizona's Energy Future: Making the Transition to a New Mix
40.*	Apr. 1982	Crime & Justice in Arizona
41.*	Oct. 1982	Impact of the New Federalism on Arizona
42.	Apr. 1983	Postsecondary Education in Arizona
43.	Oct. 1983	The Role & Responsibilities of the News Media of Arizona
44.	May 1984	Health Care Costs
45.	Oct. 1984	County Government in Arizona: Challenges of the 1980s
46.	Apr. 1985	Growth Management and Land Use Planning in Arizona
47.	Oct. 1985	Managing Water Quality in a Water Scarce State
48.	May 1986	Social Services in Arizona: Increasing Needs—Changing Resources
49.	Oct. 1986	Arizona's Changing Economy
50.	May 1987	Culture & Values in Arizona Life
51.	Oct. 1987	Arizona's Relations with Northern Mexico
52.	May 1988	Air Quality in Arizona
53.	Oct. 1988	Civil Justice in Arizona/How Much? For Whom?
54.	May 1989	SOS: Save Our Schools . . . Save Our State
55.	Oct. 1989	Of Dreams, Deeds & Dollars . . . Achieving Better Mental Health Care in Arizona
56.	May 1990	New Directions for Arizona: The Leadership Challenge
57.	Oct. 1990	The Many Faces of Economic Development in Arizona
58.	Apr. 1991	Arizona's Taxing Choices: State Revenues, Expenditures & Public Policies
59.	Oct. 1991	Preserving Arizona's Environmental Heritage
60.	Apr. 1992	Harmonizing Arizona's Ethnic & Cultural Diversity
61.	Oct. 1992	Free Trade: Arizona at the Crossroads
62.	Apr. 1993	Hard Choices in Health Care
63.*	Oct. 1993	Confronting Violent Crime in Arizona
64.*	May 1994	Youth At Risk: Preparing Arizona's Children For Success In The 21st Century
65.	Oct. 1994	American Indian Relationships in a Modern Arizona Economy
66.	May 1995	Making the Grade: Arizona's K-12 Education
67.	Oct. 1995	Public Spending Priorities in Arizona: Allocating Limited Resources
68.	May 1996	Arizona's Growth and the Environment – A World of Difficult Choices
69.	Oct. 1996	Building a Community of Citizens for Arizona
70.	May 1997	Forging an Appropriate Transportation System for Arizona
71.	Oct. 1997	Ensuring Arizona's Water Quantity and Quality into the 21st Century
72.	May 1998	Meeting the Challenges and Opportunities of a Growing Senior Population
73.	Oct. 1998	Who Is Responsible for Arizona's Children?
74.	May 1999	Future Directions in Arizona Health Care
75.	Oct. 1999	Uniting a Diverse Arizona
76.	May 2000	Higher Education in Arizona for the 21st Century
77.	Oct. 2000	Values, Ethics and Personal Responsibility
78.	May 2001	Moving *All* of Arizona into the 21st Century Economy
79.	Oct. 2001	Pieces of Power – Governance in Arizona
80.	May 2002	Building Leadership in Arizona
81.*	Oct. 2002	Arizona Hispanics: The Evolution of Influence
82.	May 2003	Health Care Options: Healthy Aging—Later Life Decisions
83.	Oct. 2003	The Realities of Arizona's Fiscal Planning Processes
84.	Jun. 2004	Pre-K - 12 Education: Choices for Arizona's Future
85.	Nov. 2004	Arizona's Water Future: Challenges and Opportunities
86.	Jun. 2005	Arizona as a Border State -- Competing in the Global Economy
87.	Nov. 2005	Maximizing Arizona's Opportunities in the Biosciences and Biotechnology
88.	Apr. 2006	Arizona's Rapid Growth and Development: Natural Resources and Infrastructure
89.	Nov. 2006	Arizona's Rapid Growth and Development: People and the Demand for Services
90.	Apr. 2007	Health Care in Arizona: Accessibility, Affordability and Accountability
91.	Oct. 2007	Land Use: Challenges and Choices for the 21st Century
92.	Apr. 2008	Who Will Teach Our Children?
93.	Nov. 2008	Housing Arizona
94.	Apr. 2009	From Here to There: Transportation Opportunities for Arizona
95.	Nov. 2009	Riding the Fiscal Roller Coaster: Government Revenue in Arizona
96.	Apr. 2010	Building Arizona's Future: Jobs, Innovation & Competitiveness
97.	Nov. 2010	Arizona's Government: The Next 100 Years
98.	May 2011	Capitalizing on Arizona's Arts and Culture

**Indicates publications no longer in print.*

ARIZONA
TOWN HALL
Creating Solutions

Arizona's Energy Future

Highlights of the 99th Arizona Town Hall

November 6 - 9, 2011

Grand Canyon, Arizona

Participants Jennifer Frownfelter and Steven Eddy

A clear set of core principles should guide Arizona's energy policy. At times, these principles may come into conflict, as with the potential tradeoff between lowering electricity costs and reducing pollution from electric plants. Energy policymakers must therefore plan holistically, with proper respect for these competing principles.

- From the 99th Arizona Town Hall Report of Recommendations

For almost 50 years, Arizona Town Hall has engaged, educated and inspired Arizonans to create solutions to critical policy issues.

Participants in the 99th Arizona Town Hall, held November 6-9, 2011 at the Grand Canyon, discussed energy and its impact on education, the economy, and our general quality of life. The result: A consensus of recommended actions to capitalize on Arizona's unique assets and build a brighter future for generations to come.

Prior to the Town Hall session, participants from throughout the state reviewed a comprehensive background report developed by Arizona State University. Meeting in facilitated small groups for two days, the participants addressed a common set of discussion questions. Trained recorders captured points of consensus and the entire group gathered for a plenary session on the third day to adopt a report of findings and recommendations.

Participants heard from Elisabeth Graffy, professor and researcher from the University of Wisconsin-Madison during Monday's dinner event. Participants also heard from a panel of authors of the 99th Arizona Town Hall Background Report, as well as a panel of students who attended the Youth Town Hall held on October 12, 2011.

This publication is a summary of the complete report and ASU's background research which are published and made available to Arizona Town Hall members, the Arizona Legislature, other elected officials, public libraries, and the general public. Download or order copies online at www.aztownhall.org, or call 602-252-9600 to request a copy.

Key Points from Background Report prepared by ASU

The Importance of Energy

- Reliable, affordable energy is often taken for granted but is essential for Arizona businesses and residents for almost everything they do.
- Arizona's manufacturing, construction, transportation, health care, and other economic sectors all depend heavily on large quantities of reliable energy.
- Significant energy is required to provide water to the state's cities and agriculture.
- Arizona residents depend on energy to provide transportation to and from work and play, to power lights, air conditioning, and other electrical devices, to provide drinking water, and many other aspects of their lives.

Arizona Energy

- Arizona's primary energy resources include a lot of sunlight along with modest amounts of coal, uranium, wind, and hydropower.
- 90% of the state's electricity is produced by nuclear, coal, and natural gas power plants.
- Close to 100% of the state's transportation fuels are generated from petroleum, with less than 1% from natural gas or electric vehicles.
- Arizona residents and businesses spent $17.6 billion on energy in 2006, approximately $3000 per person.
- Arizona's overall energy consumption has grown rapidly in recent decades and will continue to grow as the state's population grows.
- Per capita energy consumption in Arizona is lower than the national average but growing.

Energy Security

- Arizona imports all of the fuel it uses for transportation and most of the fuel it uses to produce electricity.
- $12 billion flows out of the state each year to pay for fuels to provide energy.
- The security of Arizona's energy supply is currently good but is threatened in the long-term by rising prices, aging infrastructure, international conflict and terrorism, and rising global demand for energy.
- Oil supplies are increasingly concentrated in a small number of countries, few of which are close allies of the United States, and whose collective investments in new infrastructure are falling behind what is necessary to maintain the long-term security of oil supplies.

Energy and the Environment

- Current electricity production in Arizona requires significant water, as nuclear, coal, and natural gas power plants consume more water to produce energy than other kinds of power plants.
- Transporting and purifying water to meet the needs of Arizona's growing cities requires large amounts of inexpensive energy.
- Burning of fossil fuels to produce energy is the primary human cause of climate change and the major source of local air pollution.
- Arizona's greenhouse gas emissions are growing, although Arizona emits fewer greenhouse gas emissions per capita than the US national average.
- The coal-fired Navajo Generating Station in Page, Arizona, has the 5th highest carbon dioxide emissions and 11th highest nitrogen oxide emissions in the United States.
- The health effects of air pollution from energy production are significant.
- The environmental effects of air pollution from energy production are felt throughout the state, including in rural areas and the national parks, which suffer from impaired visibility.
- Coal and uranium mining in the state pose significant health risks for mine workers.
- Environmental rules for power plants are expected to continue to tighten at the federal level, placing greater demands on plants to mitigate emissions.

Opportunities in Energy Efficiency

- Significant opportunities exist to improve energy efficiency, thereby reducing the need for new power plants and saving Arizona residents and businesses money on their energy bills.
- Investments of $1700 per person in energy efficient technologies could result in overall savings of $3900 per person, for a total savings to the Arizona economy of $24 billion and to the US economy of $1.2 trillion.
- The state's energy efficiency standards, set by the Arizona Corporation Commission, calls on Arizona utilities to become 22% more efficient by 2020, are among the nation's most aggressive, and are expected to save Arizona residents and businesses $9 billion by 2020.

Opportunities in Renewable Energy

- Arizona has the most available solar energy resources in the US and some wind energy resources.
- Solar and wind energy have reached prices that are comparable to other forms of energy production in some markets.
- The state's renewable energy standard requires the state's utilities to get 15% of their energy from renewable sources by 2025.
- The state's renewable energy standard is lower than many other Western states, although its distributed generation "carve out," which requires that 30% of utilities' renewable energy generation must come from distributed generation, is higher than most other states.
- Arizona is currently ranked fourth among all states in solar photovoltaic installations.
- Combined, the Arizona Corporation Commission's renewable and energy efficiency standards mean that Arizona utilities will not need to build a new base load power plant until after 2030.
- Several manufacturers of solar panels have located manufacturing facilities in Arizona.
- Arizona has significant potential for future economic growth from solar energy, including from the export of solar-generated electricity, biofuel, other solar-generated fuel, and solar panels.

From the Background Report prepared by

ASU Arizona State University

Student participant and speaker Jen Fuller and Background Report author/editor/speaker Sharlissa Moore

Arizona has been successful at developing energy that is reliable, secure, and affordable. These factors are keys to Arizona's economic strength and the public health and safety of its citizens.

- From the 99th Arizona Town Hall Report of Recommendations

Report of Recommendations

After reviewing the full background report prepared by Arizona State University, participants in the 99th Arizona Town Hall convened at the Grand Canyon from November 6-9, 2011. The result: a consensus of recommended actions to make the most of Arizona's energy opportunities.

Energy Policy

- A clear set of core principles should guide Arizona's energy policy. This policy must be long-term, protect future generations, and take into account the externalities that result from energy production, delivery and consumption.
- Our policy should consider our arid environment and promote Arizona's economic competitiveness with a preference for: local, renewable, sustainable and distributed generation; reduction of energy imports; increases in renewable and sustainable utility-scale generation; and continued increases in energy exports.
- We must invest in emerging and recently commercialized technologies, and continue to develop more sustainable and less water-intensive energy solutions. These technologies may require public incentives to level the playing field.
- Arizona's energy policy should seek to minimize the harmful side effects of power generation and delivery on behalf of all Arizona communities, especially our Native American and low-income communities and our future generations.

Promoting Energy Reliability, Security and Affordability

- Maintaining and upgrading Arizona's energy infrastructure will be important for energy reliability, as will diversifying energy sources, decentralizing production, and reducing environmental impacts. The state must focus on more effectively meeting the energy needs of all its citizens, especially rural residents, vulnerable populations and Native American communities.
- Cooperation between public and private entities will be required in order to provide the capital needed for long-term infrastructure improvements.
- To meet future demand, we must change current consumption habits by adding conservation and efficiency.
- Arizona should establish mechanisms to consider energy security improvements, including developing greater intrastate fuel storage capacity, and more diversified and sustainable fuel sources.
- We must continue to balance the need for reliable and secure energy that is also affordable and exhibits long-term price stability. Energy policies must consider the true costs of energy, including the evidence-based costs of the consequences of energy production.

Leadership in Setting Energy Policy

- Arizona should create or identify a body with the responsibility and authority to implement comprehensive energy policy. This body should assist in integrating local, regional and national energy resources and needs and recommend "best practices" policies that will provide regulatory consistency and save time and cost for the industry and ratepayers.

Members of Panel Ocotillo participate in panel discussions.

Both government and the private sector need to play a role in promoting energy efficiency and changing individual consumption habits. While policy changes are necessary, we should focus more on individual responsibility than government mandates.

- From the 99th Arizona Town Hall Report of Recommendations

- The Arizona Corporation Commission (ACC) should change the factors it considers when setting rates to make those factors more responsive to changing economics and energy needs. Regulations should include a performance-based system that facilitates long-term planning and decision-making. The ACC should increase community involvement in the development and approval of new energy projects.

Initiatives to Promote Energy Safety and Reliability

- Encourage more distributed energy production such as rooftop solar collectors.
- Expand the diversification of transportation fuels.
- Promote the development of more public transportation options.
- Increase funding for research and implementation of energy storage.
- Develop storage facilities for natural gas and other fuels.
- Conduct a thorough hazard assessment and mitigation plan for all energy facilities within the state.
- Build adequate electric transmission and delivery system redundancies in rural areas.

True Costs of Energy

- An energy life-cycle analysis is necessary for existing and potential energy options to incorporate externalities (e.g. water use, the environment, health and foreign wars) and incentives into energy pricing.
- Public policy should impact energy pricing by analyzing long-term planning, investment and education to the public, such as increasing public awareness of the true cost of energy.
- Approaches that stabilize utility revenues while supporting investments in energy efficiency and renewable sources should be considered such as decoupling which separates fixed infrastructure costs from consumption pricing.

Arizona's Energy Economy

- Policymakers and private enterprise should optimize the use of Arizona's competitive advantages in the energy industry to enhance the state's economy.
- Arizona should promote public-private partnerships to develop new and emerging energy technologies. Policymakers should also adopt appropriate incentives and tax policies to promote energy conservation and investments in renewable energy.
- Education efforts should aim to promote a better public understanding of the costs, benefits and impacts on energy consumption and conservation as well as the opportunities presented by increased investment in the energy industry.

Energy Sustainability and Efficiency

- Arizona's leaders must address environmental challenges through a balanced and integrative approach. They must demonstrate an understanding of our values of protecting the environment while investing in technologies and development that move us toward greater energy independence.
- Arizona needs to educate the public and change consumer behavior towards greater energy efficiency.
- While policy changes are necessary, we should focus more on individual responsibility than government mandates. Government should approach energy efficiency as a partner and adopt holistic policies in collaboration with industry.
- Sustainable and renewable energy technologies should play a predominant role in meeting Arizona's growing energy demand.

Executive Committee member Gilbert Davidson, Board Chair Ron Walker, and Development Committee Chair Art DeCabooter.

Collaboration is essential; none of us has all the resources to change and implement Arizona's energy future alone.

- From the 99th Arizona Town Hall Report of Recommendations

- Businesses, hospitals, schools and rural communities should consider installing distributed generation facilities, and incentives should be provided to encourage this.
- Reform of regulated utility pricing rules may be required to incentivize investment in programs that reduce energy demand.
- Government and industry also must invest in new infrastructure to facilitate more widespread use of innovative technologies (e.g. smart grid and smart meters).

Energy Innovation

- Arizona's research institutions, the private sector, and policymakers need to collaborate to further develop advances in energy innovation and emerging technologies.
- We must improve the education system from K-12 through higher education, with a focus on interdisciplinary science, technology, engineering and math.
- Arizona must improve workforce development and trade programs, veteran placement and vocational training.
- We should look to examples of other states that have successfully facilitated energy innovation and development.

Strategic Energy Plan

- Arizona must develop a long-term, comprehensive energy plan that seeks to create a diverse, sustainable portfolio of energy generation with as close to zero carbon emissions as feasible (by mid-century).
- Sustainability should encompass economic, commercial and environmental considerations.
- The plan should define the state's goals for meeting its needs for energy and transportation fuels, and position Arizona as an incubator of innovation and a leader in new energy technologies and conservation.
- There should be specific goals with measurable outcomes and benchmarks, including targets and timetables for the adoption of renewable and sustainable energy sources.
- Priority should be given in the plan to providing more security, dependability, and affordability for transportation fuels and natural gas supplies.
- Key state leaders will need to agree on the actions necessary to implement the plan, including a balanced approach to funding so that no one group or community is excessively burdened.
- The multiple stakeholders involved in the plan must take responsibility for educating their constituencies and communities on the elements of the plan.

Solar array, Arizona Western College.

Arizona has tremendous opportunities to develop its energy economy. Based on the state's plentiful sunshine, Arizona should be a leader in solar energy generation and the development of related technologies.

- From the 99th Arizona Town Hall Report of Recommendations

How You Can Have An Impact

- Make your views on the importance of Arizona's energy future known to the Governor (*http://azgovernor.gov/Contact.asp*).
- Use resources such as Project Vote Smart *(http://www.vote-smart.org/index.htm)* to find contact information for your elected officials, including U.S. Senators and Representatives, and inform them of your perspectives on energy.
- Keep up to date on relevant programs in your community and action you can take through the Arizona Town Hall *(http://www.aztownhall.org),* the Arizona Technology Council *(http://www.aztechcouncil.org)*, the Arizona Corporation Commission *(http://www.azcc.gov/)*, and the Arizona Commerce Authority *(http://www.azcommerce.com/*).
- Arrange a program in your community. Arizona Town Hall can provide resources, speakers, and printed materials. Use social media and personal networks to share information.
- Be a change agent. Utilize the wealth of knowledge contained in the full report from the 99th Town Hall to develop partnerships and programs that will ensure a safe, affordable and sustainable energy future in Arizona. Download the full report at *http://www.aztownhall.org*.
- Share your knowledge and the work of Town Hall participants with family, friends and coworkers.
- To join existing efforts to pursue recommendations from the 99th Arizona Town Hall, contact the Arizona Town Hall office.
- Additional resources:
  - U.S. Department of Energy (*http://energy.gov)*
  - U.S. Energy Information Administration (*http://www.eia.gov/)*
  - EIA Annual Energy Outlook report *(http://www.eia.gov/forecasts/aeo/index.cfm)*
  - Environmental Protection Agency *(www.epa.gov/cleanenergy/energy-programs/suca/resources.html)*
  - Energy Star *(www.energystar.gov)*
  - Pew Charitable Trusts' Clean Economy Report *(www.pewcenteronthestates.org/uploadedFiles/Clean_Economy_Report_Web.pdf)*
- Additional consumer resources:
  - American Council for an Energy Efficient Economy *(www.aceee.org/consumer)*
  - California's Energy Commission's Consumer Energy Center *(www.consumerenergycenter.org).*

ARIZONA TOWN HALL

Creating Solutions

We welcome your involvement, questions, and perspectives.

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Since 1962, Arizona Town Hall has been engaging and connecting Arizonans. Town Hall recommendations are a valuable resource for policymakers because they do not represent the agenda of a particular group or political perspective. Instead, Arizona Town Hall reports contain the informed consensus of Arizonans from different political parties, professions, and geographic areas of the state. A private, non-profit civic organization, Arizona Town Hall has served as a catalyst for conversations and recommendations that have influenced significant changes in Arizona's public policy over the years. Countless local, state, and national leaders have cited Arizona Town Hall as an important factor in educating people about the multiple facets of complex issues and fostering the development of personal and professional leadership skills.

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ARIZONA TOWN HALL
Creating Solutions for 50 Years!

Civic Engagement

Highlights of the 100th
Arizona Town Hall

April 22-25, 2012
Tucson, Arizona

Participants break up into five panels for two full days of discussions. Pictured above is "Panel Saguaro".

Civic engagement includes more than just involvement with the political process; it also includes how individuals participate in the life of a community and how they come together for a public purpose that is not solely self-serving.

- From the 100th Arizona Town Hall Report of Recommendations

For 50 years, Arizona Town Hall has engaged, educated and empowered Arizonans to create solutions to critical policy issues.

Participants in the historic 100th Arizona Town Hall, held April 22-25, 2012 in Tucson, considered a topic at the very core of our society–civic engagement. The result: a consensus of recommended actions to strengthen, support and solidify Arizona's future through the civic engagement of its people.

Prior to the Town Hall session, participants from throughout the state reviewed a comprehensive background report developed by Arizona State University. Meeting in facilitated small groups for two days, the participants addressed a common set of discussion questions. Trained recorders captured points of consensus and the entire group then gathered for a plenary session on the third day to adopt a report of findings and recommendations.

This publication is a summary of the complete report including ASU's background research and the report of recommendations. Town Hall reports are published and made available to Arizona Town Hall members, elected officials including the Arizona Legislature, public libraries, and the general public. Download or order copies online at www.aztownhall.org, or call 602-252-9600 to request a copy.

Key Points from Background Report prepared by

ARIZONA STATE UNIVERSITY

Setting the Stage

- The Gallup Arizona Poll found that Arizonans are highly attached to their communities but don't feel connected to their community or to one another.
- Arizona citizens agree on more than they disagree about the issues, including a strong dissatisfaction with their elected leaders.

Principles and Processes of Civic Engagement

- Civic engagement can mean many things. There is no one way of doing it and no simple recipe for success.
- Civil discourse is important to civic engagement. It can be defined as robust, honest, frank and constructive dialogue that seeks to advance the public interest.
- Deliberative democracy is a range of practices aimed at involving lay citizens in issues of general public interest or community concerns. Deliberative democracy brings together diverse groups of community members to learn about each other, work through differences, and seek areas of common ground and agreement.
- There is a need for stronger structures that embed and sustain civic engagement, better tracking and assessing of engagement, and further exploration on how online and face-to-face engagement can support one another.

Exploring the Civic Infrastructure

- Arizona's civic culture is in flux. Gaps exist in the development of future civic leaders, particularly at the state level. There is currently no system that links civic learning, engagement, and learning across ages.
- Effective citizen engagement can foster a greater sense of community, engender trust, enhance creative problem solving, and even increase the likelihood that citizens will support financial investments in community projects. A wide range of tools and approaches are available to effectively engage citizens.
- In "ballot box democracy," citizen participation is sporadic, and citizens are perceived as consumers rather than as partners of government. In this situation, the few avenues for citizen involvement that do exist seldom go beyond information and consultation.
- Participatory governance refers to democratic spaces of deliberation and decision-making that allow people to influence policies and share control on matters that affect them. Participatory governance revitalizes democracy by reducing feelings of disconnection that people have with government and with their own communities.
- Schools contribute to citizenship by providing opportunities to engage in discussions where one's narrower interests are held up to the scrutiny of a larger community. Civic engagement is enhanced when schools prioritize open inquiry and free interplay of ideas.
- Nonprofits play a central roles in citizen engagement—acting as vehicles for citizens to organize outside of government and without financial gain.
- Throughout history, the arts have been used to provoke, inspire and catalyze social change and civic dialogue.
- Local businesses can help foster civic engagement and civic pride in communities. Conversely, states with higher levels of civic engagement are more resilient to unemployment and better equipped to handle periods of economic downturn.
- Civic engagement plays a key role in science and in how we imagine, design, and implement research and technology.
- The media is an important contributor to civic life, principally by informing, educating and providing a forum for public debate.
- Many fear that media coverage has become increasingly negative, polarizing, sensational and biased, eroding the confidence and cohesiveness of our state and its people.
- The rise of Internet-based information outlets threaten traditional media's economic base but also exponentially expand the reach and connections among policymakers and citizens.

Engaging Arizona's Diverse Communities

- Opportunities abound in Arizona's municipalities for local residents to engage in the civic life of their communities, whether as a first-timer or a veteran participant.
- Two factors have a significant impact on civic engagement among youth and young adults—college education and race-ethnicity. Studies have identified a large and growing number of "civically alienated" young people who are most likely characterized as "Latino, non-college-educated and low income youth."
- Today's college students are coming to college more service-oriented, but the mindset is not translating into other action-based forms of civic engagement.
- Connecting older adults to civic engagement opportunities is a newer movement and there are a growing number of formalized programs in this area.
- Civic engagement in tribal communities is often derived from affinity to a unique set of tribal sovereignty rights, as well as principles and practices stemming from Indigenous origin stories.
- Civic engagement in rural Arizona encompasses many of the traits that are present in urban Arizona, with some unique aspects: limited resources, informal networking, more holistic knowledge, greater social cohesion in isolated geographic regions and stronger peer pressure.

After reviewing a draft of the report of recommendations, Tina Ochoa and others wait their turn to present proposed amendments during the plenary session on Wednesday morning.

From ancient times to the current day, civic engagement has been critical for a vibrant, productive, and enlightened society. The members of the 100th Town Hall call on all Arizonans to embrace the concepts of civic engagement and practice the best aspects of this positive political philosophy.

- From the 100th Arizona Town Hall Report of Recommendations

Report of Recommendations

After reviewing the full background report prepared by Arizona State University, participants in the 100th Arizona Town Hall convened in Tucson from April 22-25, 2012. The result: a consensus of recommended actions to improve and enhance civic engagement in Arizona.

TAKE PERSONAL RESPONSIBILITY

- One person can make a difference. It is up to each of us to become involved, to the extent possible, in our communities.
- Model courteous interaction and encourage civic engagement.
- Demonstrate by example the importance of being involved.
- Encourage people to accept responsibility for public comments that may discourage others from exercising free speech and engaging.

INVOLVE EDUCATIONAL INSTITUTIONS

- Formally integrate civic engagement and civil discourse into the curriculum of schools for students at an early age.
- As children progress through school, require civics and history courses. Weave the lessons and issues of civic engagement into the core standards for substantive courses such as language arts and history.
- Include classes that involve the teaching of conflict resolution, critical thinking and active listening skills, and encourage civil interactions, especially during times of disagreement.
- Include programs like Justice Sandra Day O'Connor's I-Civics program.
- Have the Department of Education review state regulations for civics education and make changes to ensure that Arizona's regulations satisfy national standards.
- Encourage post-secondary educational institutions to create centers for civic engagement and to provide continuing education courses that include all levels of government, community planning, civic engagement and civil discourse.

ENCOURAGE YOUNG PEOPLE TO BECOME INVOLVED IN THEIR COMMUNITIES

- Encourage students to become involved in extracurricular activities including student government as well as music and drama clubs, afterschool sports, and speech and debate clubs.
- Support opportunities for students to become directly involved in their communities through internship programs, summer camps and volunteer projects.
- Reward students who engage in civic activities making it prestigious to be civically involved.
- Encourage creation of a mechanism for student loan forgiveness in return for significant civic engagement accomplishments.

HARNESS MEDIA TO PROMOTE EFFECTIVE CIVIC ENGAGEMENT

- Encourage government officials to write articles about the importance of government participation.
- Have municipal organizations publicize lists of opportunities for people to become involved with their communities.
- Create a series of public service announcements with civic engagement themes for television and radio.
- Evolve the communications strategies and tactics of Arizona Town Hall to use current and emerging social media to promote the recommendations of current and past Town Halls.
- Businesses and nonprofits can use their social media accounts to educate people about volunteer opportunities and ways to become involved in the community.
- Encourage news media to report a more balanced perspective.
- Businesses can hold the media accountable by withdrawing sponsorships from biased media.

Panel Yucca's discussion group had 25 participants including those pictured above: Craig Miller, Stephanie Miller, Michael McDonald and Gail Lewis.

To encourage more participation from traditionally underrepresented groups, we should provide formal and informal forums for discussion, such as community gardens and community advisory boards.

- From the 100th Arizona Town Hall Report of Recommendations

UTILIZE TECHNOLOGY TO ENCOURAGE PEOPLE TO BECOME CIVICALLY ENGAGED

- Through the Secretary of State's office, continue ongoing research on an online voting system.
- Permit people to provide testimony and address at the state legislature and other bodies without having to physically register in Phoenix at the State Capitol.
- Use television and online mediums to make public meetings interactive.
- Have cities and nonprofits keep community calendars posted on their websites to promote events and recruit volunteers for particular projects.
- Establish an Arizona Town Hall website that would include a listing of Arizona and national organizations that support civic engagement, a resource list of materials, a calendar of relevant activities in Arizona, and a speaker's bureau identifying speakers knowledgeable about civic engagement.

PARTICIPATION IN PUBLIC SERVICE

- Consider and analyze factors that deter individuals from serving in public office.
- Once barriers are identified, have advocates work to eliminate those barriers.

INCREASE GOVERNMENT TRANSPARENCY AND ACCOUNTABILITY

- Undertake measures at the State Legislature to increase transparency, including 72 hours advance notice of any revisions to bills.
- Increase advance notice with respect to the state budget to seven days.
- Televise and stream over the internet legislative hearings and committee meetings.
- Use clear and universally understandable language in initiatives, referenda, and communications from officials. Disseminate in a way that is accessible to everyone.
- Increase transparency in campaign finance and lobbying expenditure disclosures.

MAKE POLITICS LESS POLARIZING

- Insist that state and local government officials work on keeping their disagreements civil.
- Require officials to take a course on civil discourse that includes a discussion of "constructive confrontation" principles and that discourages negative campaigning.

PROMOTE CIVIC ENGAGEMENT

- Expand Arizona Town Hall's scholarship program to help students and others in need to attend this event.
- Encourage civic education organizations to collaborate to create a civic engagement directory that can be maintained online.
- Offer or expand training on the theory and skills of civic engagement through civic education organizations to neighborhood associations, civic groups and other community organizations.
- Recommend that the various leadership organizations in Arizona include training and curriculum on civic engagement.
- Promote personal involvement and mentorship to encourage others to become civically engaged.
- Encourage the adoption of election reform that facilitates increased voter participation in both primary and general elections.
- Undertake grassroots and other campaigns to raise awareness about the valuable resources available from groups across Arizona that help people become more knowledgeable about civic issues.

STEPS TO IMPLEMENT ACTION

- Have an agency with expertise in civic engagement convene Arizona's experts on this topic to collaborate on developing a plan to create a Civic Engagement Roadmap for Arizona.
- In the roadmap, address: the startup and rollout of implementation at the state and local level; identifying and coordinating current civic engagement resources, opportunities and best practices; identifying funding sources for implementation and sustainability; and providing technological resources for implementation.
- Encourage the use of a code of civil discourse by the Executive Branch, the Legislative Branch, public universities, colleges, schools and state and local governments.

Participants discuss the principles of civic engagement at the Youth Town Hall.

> I widened my idea of civic engagement, and saw that there are many ways to get involved with my community as well as to get my community involved with everything else. I always thought that politics didn't involve me, but now I see that it does.

- Comment from a student attendee of the Youth Town Hall on Civic Engagement.

Youth Town Hall on Civic Engagement

On April 11, 2012, the Arizona Town Hall, in partnership with Arizona Students' Association, and Maricopa Community Colleges, held a Youth Town Hall on Civic Engagement that drew hundreds of high school and college students from around the state. Following are the key points developed from the gathering.

Forms of Civic Engagement and Factors Affecting Participation

- Civic engagement is more than just politics. It can be any activity that strengthens the community and creates a common bond.
- Volunteering and becoming involved in grass roots initiatives are important for all ages in increasing engagement.
- The goal of civic engagement should be the organization of members of the community to educate themselves about issues.
- Individuals must take responsibility for informing themselves and exchanging viewpoints with each other.
- Civic engagement is the first step toward making an impact and driving change.
- Educational and income levels can impact civic engagement because they impact the access to information and the understanding of it.
- The involvement of parents in civic issues has the tendency to trickle down to their children.
- There should be more forums and discussion groups at the community level to help people get informed and have an opportunity to talk about issues together.

The Role of Social Media in Civic Engagement

- Social media helps raise awareness.
- The effectiveness of social media may be limited by access, author bias, and the demographics of those participating.
- Social media allows for instant distribution of information to a wide audience, and its full potential has yet to be reached.
- Discussions and in-person contact are still important in communicating ideas and viewpoints and engaging people in issues.
- Social media is effective for planting a seed and is an efficient way to enlarge the conversation.
- Social media can be a great organizational tool that supports civic engagement and maintains the passion behind the cause.

Importance of Respect and Collaboration in Civic Engagement

- Respect is important because it prevents the exclusion of people or ideas that might be relevant.
- Mutual respect allows for a closer community and the ability to create better solutions.
- People have become discouraged from getting involved because there is so much negativity in politics.
- Without respect and collaboration, we cannot work together to create positive change.
- Attack the issue, not the person.

Increasing Civic Engagement Among Youth

- The greatest challenge in increasing youth engagement is getting them to care and believe that every voice and vote counts.
- High school is the best place to start getting youth involved. High school students can be great leaders and can learn and teach civic engagement.
- Young people lack confidence in the political system and often lack knowledge of the issues. Expand the scope of information available through schools, families, social media, and community activities.
- Civics classes create a strong foundation for engagement.
- Role models can help youth realize that they can find and follow their passion and have a positive impact for themselves and others.

Tuesday's Arizona Town Hall lunchtime program included a performance by local Tucson musicians.

The arts and humanities educate about social issues in attention-grabbing ways, bring communities together, teach the values of diversity and other cultures, and ultimately promote further discussion, deep thinking, and civic engagement.

- From the 100th Arizona Town Hall Report of Recommendations

How You Can Have An Impact

- Be the change. Model the behavior you expect from elected officials, youth and others.
- Use available resources, such as the appendix to the background report for the 100th Arizona Town Hall, to partner with existing organizations and develop ideas for increasing civic engagement in your community. Download the full report, including the appendix of resources for civic engagement at *http://www.aztownhall.org*.
- Make your views on improving access to the government known to your elected officials. Visit Vote Smart *(http://www.vote-smart.org/index.htm)* to find contact information for your elected officials.
- Keep up to date on relevant programs in your community and action you can take through the Arizona Town Hall *(http://www.aztownhall.org)*.
- Arrange a program in your community. Arizona Town Hall can provide resources, speakers, and printed materials. Use social media and personal networks to share information.
- Share your knowledge and the work of Town Hall participants with family, friends and coworkers.
- To join existing efforts to pursue recommendations from the 100th Arizona Town Hall, contact the Arizona Town Hall office.

ARIZONA TOWN HALL

Creating Solutions for 50 Years!

We welcome your involvement, questions, and perspectives.

One East Camelback Rd. | Suite 530

Phoenix, AZ 85012 | 602-252-9600

www.aztownhall.org

Find us on Facebook

Since 1962, Arizona Town Hall has been educating,engaging and empowering Arizonans. Town Hall recommendations are a valuable resource for policymakers because they do not represent the agenda of a particular group or political perspective. Instead, Arizona Town Hall reports contain the informed consensus of Arizonans from different political parties, professions, and geographic areas of the state. A private, non-profit civic organization, Arizona Town Hall has served as a catalyst for conversations and recommendations that have influenced significant changes in Arizona's public policy over the years. Countless local, state, and national leaders have cited Arizona Town Hall as an important factor in educating people about complex issues, and fostering the development of civic and community leaders.

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Tara Jackson

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Phoenix, AZ 85083

Phone: 623.594.7033
Cell: 602.909.1978
taraljackson@cox.net

Professional Experience

President 06/2006 - Current

Arizona Town Hall Phoenix, Arizona

Responsible for all aspects of operating a politically and professionally diverse non-profit organization including:

1. Creatively and strategically moving the organization forward after the retirement of its longtime President;
2. Establishing financial viability of the organization, including working with a development consultant and board members to establish an endowment as well as grants and contributions to support programmatic goals;
3. Raising the profile and impact of the organization through public speaking, publications, strategic partnerships and statewide programs that utilize methods of civil discourse to engage diverse audiences;
4. Working with Arizona's universities and the Town Hall's research committee to create interdisciplinary research on areas of public policy;
5. Working with political leaders, the media, and diverse audiences to create consensus-based solutions to policy issues facing Arizona; and
6. Raising awareness of the importance of civil discourse through programs, partnerships, speaking engagements and the development of curriculum for college and graduate-level classes as well as professional organizations.

Attorney and Shareholder 09/1990 - 06/2006

Bonnett, Fairbourn, Friedman & Balint Phoenix , Arizona

Responsible for all aspects of a commercial litigation law practice including:

1. Acting as lead counsel for commercial and employment cases in federal and state courts;
2. Chairing the firm’s Employment Law section;
3. Managing a mid-size law firm with over 70 employees, including service on the firm's Management and Human Resources committees and acting as Hiring Partner; and
4. Representing the firm in client presentations and public speaking engagements.

Education

J.D. (with honors): Indiana University School of Law 1990

Bloomington, Indiana

B.S.: Indiana University – Biology 1987

Bloomington, Indiana

Community Involvement

Current: Chair, Project Civil Discourse; Board Member, ASU College of Public Programs; Mentor, ASU Spirit of Service Scholars; Member, Soroptimist Club of Phoenix; Volunteer, Arizona Twirling Athletes

Past: Visiting Lecturer, ASU College of Public Programs and ASU Law School; Adjunct Professor, ASU College of Law; Lawyer Representative for the 9th Circuit (including serving as co-chair of the Arizona delegation); various leadership roles for Soroptimist International of Phoenix (including President); Big Sister for Valley Big Brothers/Big Sisters; Family Sponsor and Mentor for Homeward Bound; Visiting Speaker, Homeward Bound; Member, Merit Selection Panel for the appointment and reappointment of United States Magistrate Judges; various roles for the Arizona State Bar, including presentations at the State Bar Convention and legal education programs for elementary and high school students.

Town Hall Biography
Mary Mangotich Grier

Mary Mangotich Grier is an Assistant City Attorney for the City of Phoenix, where she works in the area of economic development and finance. From 1994-2007 Ms. Grier served as an Assistant Attorney General for the State of Arizona representing the Arizona State Land Department in major litigation and real estate development matters. From 1977-1994 Ms. Grier was in private civil practice in Tucson, Arizona and Monterey, California, with an emphasis on civil litigation and bankruptcy and financial reorganization matters. During 1982-83 Ms. Grier also served as an adjunct professor of law at the University of Arizona College of Law.

Ms. Grier has served the State Bar of Arizona, the Pima County and Monterey County Bar Associations, and the Arizona Women Lawyer's Association in a variety of leadership roles, and was acknowledged as the State Bar of Arizona's Member of the Year in 1999. Ms. Grier has served as a member of the board of directors and in various offices and committees of the Arizona Bar Foundation, the University of Arizona Law College Association, Arizona Town Hall, and Soroptimist International of Phoenix. Ms. Grier also has provided volunteer service to a variety of other professional and community organizations and programs.

MARY MANGOTICH GRIER

PROFILE

Accomplished, versatile attorney with substantial private sector and public practice experience in real property and commercial transactions, administrative law, civil litigation and appellate advocacy. Admitted in Arizona (1977) and California (1989).

LEGAL EXPERIENCE

City of Phoenix Law Department
Assistant City Attorney, 2007 – present

- Served as legal counsel to the City of Phoenix Community and Economic Development Department, including general matters, small business division programs, and the Phoenix Community Development and Investment Corporation (a Community Development Entity that sponsors New Markets Tax Credit investments); the City of Phoenix Real Estate Department transactional matters, and the City of Phoenix Housing Department, including Section 32/scattered sites issues, HOPE VI Projects (Matthew Henson, Krohn West, and pending applications), HOME loans and down payment assistance, and a variety of other matters as assigned
- Practice currently focused on real estate, housing, economic development and finance transactions

Office of the Arizona Attorney General
Assistant Attorney General, 1994-2007

- Represent the Arizona State Land Department in a variety of complex real estate, land use planning and development matters including sales, leases, rights-of-way, and development agreements.
- Served as interim supervisor of Water Rights Adjudication Team, overseeing settlement and other negotiations and water rights litigation in state and federal courts.
- Successfully prosecuted, defended, and settled a variety of major litigation cases in state and federal trial and appellate courts.
-

Horan, Lloyd, Karachale, Dyer, Horan & Schwartz, Inc., Monterey, California.
Firm Member, 1992-1994; *Associate Attorney*, 1989-1992

- General civil litigation practice, including commercial, tort, ERISA, land use, and complex bankruptcy litigation and workouts.
- Managed all aspects of cases and all phases of litigation, including motion practice, discovery, settlement, mediation, court and jury trials and appeals.

Bilby & Shoenhair, P.C., Tucson, Arizona.
Shareholder, 1981-1989; *Associate Attorney* 1977-1981

- General civil practice with one of Southern Arizona's oldest and most prestigious law firms.
- Practice included commercial, real estate and lending transactions, representation of debtors, creditors and trustees in bankruptcy proceedings and workouts, and commercial and tort litigation.
- Served in a variety of administrative roles, including Coordinator of the Commercial Department, and member of the Executive Committee and the Merger Committee.

University of Arizona College of Law
Adjunct Professor, 1982-1983

- Taught two semesters of trial practice.

EDUCATION

University of Arizona College of Law
Juris Doctor (cum laude), 1977

- Received highest passing grade on July, 1977 Arizona Bar Examination
- Class rank: 12th of 121 (Order of the Coif)
- Writer, Arizona Law Review 1975-1976
- Member, Moot Court Board, National Moot Court Team 1976-1977
- Outstanding Advocate Award, 1977
- Winner, Jenckes Jury Argument Competition, 1977

California State University at Northridge
Bachelor of Arts in Speech Communication (cum laude), 1974

- Outstanding Service Award, Department of Speech Communication, 1974
- National debate team, various awards in forensics

Pasadena City College
Pre-med and liberal arts prerequisites, 1970-1972

- Honors extraordinary in Forensics and Speech, 1972
- Second place champion, National Junior College Debate Tournament, 1972
- Paul W. Smith Award for Forensics, 1972
- Carl Bovero Award, 1972

PROFESSIONAL HONORS AND PUBLICATIONS

- University of Arizona James E. Rogers College of Law, Service Award (2006)
- State Bar of Arizona, CLE Award (2001)
- Volunteer Lawyer Program, Public Attorney of the Year (2000)
- Arizona Attorney General's Office, Overall Outstanding Achievement Award (2000)
- State Bar of Arizona, Member of the Year Award (1999)
- Arizona Attorney General's Office, Litigator of the Year Award (1997)
- Outstanding Graduate Award, University of Arizona College of Law (1987)
- Note, *Wealth, Textbooks and Equal Protection*, 17 Ariz. L. Rev. 704 (1975)
- Mary Mangotich Grier, *Creating Rights of Access for Private Landowners*, 6 Real Property Section Journal No. 3 (October/November 1996)
- Numerous seminar presentations

PROFESSIONAL ACTIVITIES

- Instructor, National Association of Attorneys General Trial Advocacy Institute (2006)

- Member, Continuing Legal Education Committee, State Bar of Arizona (1995-2004) (Chair, 1998-2000)
- Member, Executive Council, Environmental and Natural Resources Law Section, State Bar of Arizona (1997-2003)(Central Arizona Program Chair, 1998-99; Secretary, 1999-2000; Chair-Elect 2000-01; Chair 2001-02; Past Chair 2002-03)
- Member, Board of Legal Specialization, State Bar of Arizona (1999-2002)
- Executive Committee, Monterey County Bar Association 1992-1994 (Secretary, 1993; President-Elect 1994)
- Member, Board of Directors and Founding Fellow, Arizona Bar Foundation (1984-88) (Secretary, 1984; President-Elect 1989)
- Member, City of Tucson Magistrate Merit Selection Committee (1987-88)
- Chair, U.S. Magistrate Merit Selection Commission (1986)
- Arizona Women Lawyer's Association (President, Southern Arizona Chapter, 1983-84)
- Attended the National Institute for Trial Advocacy

COMMUNITY ACTIVITIES

- Member, Board of Directors, University of Arizona Law College Association **(**1996-2009) (President 2004-06; Vice-President 2003; Secretary 2002)
- Arizona Town Hall (1984-2009) (Board Member 2008-2012, Training Committee 1986-1989 and 1995-2007; Follow-Up Committee 2000-01, 2007; Report Chair for 52nd Arizona Town Hall, 66th Arizona Town Hall, 73rd Arizona Town Hall, and 93rd Arizona Town Hall)
- Soroptimist International of Phoenix (1998-2009) (Corresponding Secretary 2000-01, Vice-President 2001-02, President-Elect 2002-03, President 2003-04, chair of various committees 2004-2009)
- Community Legal Services Volunteer Lawyers Program (volunteer 1995-2007)
- Arizona Center for Law-Related Education (judge, We the People and Project Citizen, 1997-2007)
- Recording for the Blind and Dyslexic (law reader, 1995-2003)
- Odyssey of the Mind (volunteer judge, 1998-2000)
- Southern Arizona Legal Aid Volunteer Lawyers Program (volunteer 1985-1989)
- Young Lawyers Division Mock Trial Program (volunteer coach and judge, 1985-86)
- CASA (Court Appointed Special Advocates) Volunteer

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Stephen Anderson has been practicing law in Phoenix since graduating from the University of Chicago Law School in 1989. Mr. Anderson started his practice with the law firm of Meyer, Hendricks, Victor, Osborn & Maledon before joining Gammage & Burnham in 1991. In 1992, Mr. Anderson began practicing land use law with Grady Gammage, Jr., and has specialized in this area of the law since that time. He became a partner at Gammage & Burnham in 1998.

Mr. Anderson has worked on a wide variety of land use projects in his career, including some of the most significant development projects in Arizona. Specific projects are detailed below.

- Lead representative for the entitlement process for the Marriott Resort at Desert Ridge, which, at 950 rooms, was Arizona's largest hotel at the time of entitlement.
- Represented Sunbelt Holdings in the annexation and entitlement process, including the drafting and negotiation of the development agreement, for Vistancia, a 7,000 acre master planned community located in northwest Peoria. Vistancia is the largest project in the history of the City of Peoria.
- Lead representative on the Cahava Springs project, a proposed 1,000 acre residential subdivision with two nature preserves, each in excess of 80 acres, and over two miles of off-site infrastructure access. Cahava Springs is the largest project in the history of the Town of Cave Creek.
- Primary private landowner representative in the City of Phoenix's sharply contested two year overhaul of its billboard ordinance, the first overhaul of that ordinance in thirty years, ultimately approved in 2011 by the Council on a 5-4 vote.
- Represented Waste Management of Arizona in its effort to triple the lifespan of the Butterfield Station Landfill from 40 years to 120 years. As part of this project, the footprint of the landfill was increased from 640 acres to 960 acres.

As Arizona's real estate economy has evolved, Mr. Anderson has continued to broaden his experience and practice. In the burgeoning alternative energy field, Mr. Anderson represents solar energy providers, both photovoltaic and stored energy technologies, in their entitlement efforts. These efforts have included interaction not just with local governments but also with aviation officials at the local and federal level, including military officials.

Mr. Anderson has also created a regular practice of representing neighbors and neighborhood groups in entitlement matters. For example, Mr. Anderson has represented residents with concerns about school athletic facilities, large church complexes, and municipal dog parks within their neighborhoods. Mr. Anderson's ability to represent communities, and to do so efficiently, has provided Mr. Anderson with unique insights into, and credibility with, both community representatives and municipal officials in the entitlement process.

Mr. Anderson is also certainly experienced in zoning more routine projects, such as subdivisions, neighborhood commercial projects, and office parks and buildings. In the course of such efforts, he has entitled well over one million square feet of office and retail space and thousands of homes and multi-family dwelling units. Clients have included Ryland Homes, KB Home, DR Horton and Richmond American on the residential side, and Vestar, John F. Long Properties, Evergreen and Kitchell on the commercial side. In addition, he has also entitled wireless telephone towers, mini-storage warehouses, private schools, a cemetery, an alcohol rehabilitation center, and a homeless shelter. For his work on the last project, Homeward Bound's Thunderbirds Village, he received the Arizona Bar Foundation's 1998 Pro Bono Affordable Housing Award.

In addition to entitlements and referenda challenges, Mr. Anderson has worked on development agreements, annexations, variances, use permits, site plan approval, design review approval, platting, building permit issuance, and certificate of occupancy issuance.

Finally, Mr. Anderson has worked on land use issues in a plethora of Arizona jurisdictions, including the Cities of Phoenix, Mesa, Glendale, Scottsdale, Chandler, Tempe, Peoria, Avondale, Apache Junction, Flagstaff, Surprise, Sedona, and El Mirage; the Towns of Gilbert, Fountain Hills, Paradise Valley, Buckeye, Guadalupe and Cave Creek; and Maricopa, Pinal, Yavapai, Coconino and Gila Counties. He has worked with the Arizona State Land Department on numerous projects.

Mr. Anderson is also active in the community on both the local and statewide levels. Locally, he is a past Chair of Neighborhood Housing Services of Phoenix and the Valley Forward Association, and also served on the Board of the Rosson House Heritage Square Foundation & Guild. On a statewide level, Mr. Anderson has long been active with Planned Parenthood of Arizona, currently serving on the Board of the Planned Parenthood Advocates of Arizona, Planned Parenthood's Political Action Committee. Mr. Anderson is also a former Chair of the Administrative Law Section of the State Bar. He has been a member of the Arizona Town Hall since 1993, and serves on the Training Committee for that group.

Mr. Anderson was born and raised in Miami, Florida. He attended both Haverford College and the London School of Economics, obtaining his degree from Haverford in 1986. He graduated with a double major in Political Science and History, receiving Honors in the former.

« Return to Stephen W. Anderson's Biography

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JSS

Jennings Strouss
Attorneys at Law

J. Scott Rhodes

Member and Managing Attorney, Phoenix Office

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www.jsslaw.com

Mr. Rhodes is Managing Attorney of Jennings, Strouss & Salmon and also serves as a member of the firm's three-person Management Committee. Prior to his current role, he served as General Counsel to the firm.

Mr. Rhodes has an extensive background in legal ethics. He regularly advises attorneys and law firms in matters relating to State Bar complaints, fee disputes, disciplinary matters, bar admission and other licensing, ethics, and professional responsibility issues.

In 2011, the Arizona Supreme Court appointed Mr. Rhodes to serve on its Attorney Regulation Advisory Committee. This Committee makes recommendations regarding attorney examination, admissions, reinstatement, disability and the lawyer discipline process.

In 2009, the Arizona Supreme Court appointed Mr. Rhodes to serve as a Member of its Attorney Discipline Task Force, which reviewed the rules of the attorney regulation system and recommended substantial changes to the Arizona Supreme Court that were implemented in 2011.

Mr. Rhodes was named Phoenix Administrative Lawyer of the Year 2011 by The Best Lawyers in America®. The State Bar of Arizona selected Mr. Rhodes for the 2010 Member of the Year Award. Mr. Rhodes is AV® Preeminent™ Peer Review Rated* by Martindale Hubbell and has been listed in The Best Lawyers in the categories of Administrative/Regulatory Law, Ethics and Professional Responsibility Law and Legal Malpractice Law - Defendants from 2009 through 2013. He was also named a Southwest Super Lawyer® in 2007 in the categories of Administrative Law, Law and Politics and in 2011 and 2012 in the categories of Professional Liability, Defense, Government/Cities/Municipalities, and Utilities Law.

Under Mr. Rhodes' leadership, Jennings Strouss & Salmon ranked #1 in the US in Ethics and Professional Responsibility Law by The Best Lawyers in America® 2010, and #1 in Arizona in 2011.

Mr. Rhodes also practices in the areas of energy and utilities law, local government law, and professional corporate governance and structure.

Prior to joining the firm, Mr. Rhodes served as Law Clerk to the Honorable Robert Corcoran and the Honorable Charles E. Jones, Arizona Supreme Court, in 1995-1996. Before embarking on his legal career, Mr. Rhodes operated his own business in Paris, France for nine years.

Areas of Focus

- Lawyer Professional Responsibility
- Energy and Utility Law
- Local Government Law

Representative Engagements

Lawyer Professional Responsibility

- Regularly represents public and private lawyers in defense of Bar complaints and fee arbitrations
- Regularly provides ethics counsel to lawyers and law firms

Energy and Utilities Law

- General Counsel of a municipal electrical utility.
- Conducted legal due diligence in view of participation in a construction of an electric generation power plant, including review and negotiation of contracts, bond issues, and engineering, environmental, financing, and labor reports and projections

Local Government

- Extensive experience in local and county governance, and formation and management structures of special taxing districts

Articles, Publications and Presentations

Articles

- Author, "Change on the Horizon," *Attorney at Law Magazine* (April 5, 2010)

- Author, “Exploring the Unthinkable in Lawyer Discipline: Disbarment, Suspension and Reinstatement,” Advocate: Arizona Trial Lawyers Association (October 2008)

Presentations

- Presenter, Ethical “Tune-Up” Seminar, City of Glendale City Attorney’s Office (2012)
- Presenter, “Fifteenth Annual Public Practice Legal Seminar,” ACIP & Arizona Counties Civil Deputies Association (2012)
- Presenter, “Ethics and Public Lawyer,” State Bar of Arizona (2012)
- Presenter, "The Ethics of Ancillary Businesses,” Warner Angle Hallam Jackson & Formanek, PLC (2012)
- Presenter, "The Lawyer Discipline System: How is it Working?," State Bar of Arizona (2012)
- Presenter, "Dial 'E' for Ethics," State Bar of Arizona (2012)
- Presenter, “Conflict of Interest Restriction After Carrigan: Legislative Voting and First Amendment,” American Bar Association, Section of State and Local Government Law (2011)
- Presenter, “Avoiding Ethical Pitfalls: Navigating the Ethics Rules,” State Bar of Arizona, Continuing Legal Education (2005-2009; 2011)
- Presenter, “Moving On: Closing, Selling or Otherwise Leaving Your Practice,” State Bar of Arizona (2010)
- Presenter, “Ethics Seminar,” West Maricopa Bar Association (2010)
- Presenter, “Changes to Arizona’s Attorney Discipline System,” Arizona Attorney General’s Office (2010)
- Presenter, "A Lawyer's Day in Court: The Mechanics of Arizona's Attorney Regulation System," State Bar of Arizona's CLE By the Sea Conference (2010)
- Presenter, "Game Show Ethics!," U.S. Attorney's Office - District of Arizona, AUSA Symposium (2010)
- Panelist, "Minding the Store: Internal Ethics and Liability Management for Law Firms of All Shapes and Sizes," State Bar of Arizona (2010)

- Presenter “Arizona State Bar Ethics Training,” Yavapai County Public Defender’s Office, Continuing Legal Education (2009, 2010)
- Presenter, "Are We All In the Same Sandbox? The Various Facets of a Multi-Jurisdictional Practice," State Bar of Arizona, Continuing Legal Education (2009)
- Panelist, “Real World Negotiation Ethics,” State Bar of Arizona’s Alternative Dispute Resolution Section (2009)
- Presenter, “2009 Course on Professionalism,” State Bar of Arizona (2009)
- Panelist, “Minding the Store: Internal Ethics and Liability Management,” State Bar of Arizona’s CLE By the Sea (2009)
- Presenter, “Ethical Estate Planning and Administration: The Devil’s in the Details,” Maricopa County Bar Association (2009)
- Presenter, “Lawyer Discipline – And 20 Tips on How to Avoid It,” Lorman Seminars, Legal Ethics in Arizona (2009)
- Panelist, “Balance in Life and Law Practice,” State Bar of Arizona, Minority Bar Convention (2009)
- Presenter, “Changes to Ethics Rules and Trust Account Audits: Lawyers Who Represent Lawyers Explain What You Need to Know,” Maricopa County Bar Association, Continuing Legal Education (2009)
- Presenter, “Ethics Café,” State Bar of Arizona, Continuing Legal Education (2008)
- Presenter, "The Ethics of Dealing with Difficult People," City of Glendale, City Attorney's Office (2008)
- Presenter, “Double Trouble: Concurrent Disciplinary Actions and Legal Malpractice Suits,” ABA (2007)
- Presenter, “The Ethical Challenges and Opportunities of Public Representation,” Glendale City Attorney’s Office (2007)
- Presenter, “Annual Ethics Game Show!,” State Bar of Arizona (2006)
- Presenter, “Twenty Ways to Avoid Discipline!,” State Bar of Arizona, Continuing Legal Education (2006)

- Moderator, “Confessions for the Pocketbook as Well as the Soul?,” American Bar Association Center for Professional Responsibility National Conference (2005)
- Presenter, “Due Process and Ethical Considerations in Probate Litigation and Estate Planning,” Maricopa County Bar Association Estate Planning, Probate and Trust Section (2005)
- Presenter, “What to Do When the Bar Comes Knocking at Your Door: What You Should Know About the Discipline Process,” Arizona Attorney General’s Office (2005)
- Presenter, “How to Open and Keep Open a Profitable Law Firm,” State Bar of Arizona, Continuing Legal Education (2004)
- Guest Lecturer, “Professional Responsibility,” ASU Sandra Day O’Connor College of Law, Professional Responsibility Course (2004)
- Presenter, “Ethics and Professionalism Seminar,” Salt River Project (2003)
- Presenter, “2003 Amendments to Arizona Rules of Professional Conduct,” Blue Cross & Blue Shield of Arizona (2003)
- Presenter, “Lawyer Discipline System: Introduction,” State Bar of Arizona (2002, 2003)
- Presenter, “Fifth Annual Public Practice Legal Seminar,” ACIP & Arizona Counties Civil Deputies Association (2002)

Media

- Podcast, "What an Arizona Attorney Should Do When They Receive a Bar Complaint," (July 2, 2012)
- Podcast, "What a Law Firm Should Do When an Attorney Has a Substance Abuse Problem," (July 6, 2012)
- Podcast, "What Attorneys Should Know About Having a Virtual Law Office in Arizona," (July 6, 2012)

Honors and Recognition

- Co-recipient, Member of the Year Award, State Bar of Arizona (2010)

- Listed, *The Best Lawyers in America*® (2009-2013) in the categories of Administrative/Regulatory Law, Ethics and Professional Responsibility Law and Legal Malpractice Law – Defendants
- Phoenix Administrative Lawyer of the Year 2011, *The Best Lawyers in America*®
- Listed, *Southwest Super Lawyers*, in the category of Administrative Law (2007); in the categories of Professional Liability, Defense, Government/Cities/Municipalities, and Utilities Law (2011, 2012)
- AV® Preeminent™ Peer Review Rated*
- Chevalier de l'Ordre du Mérite National (Knight of the Order of National Merit, Republic of France)

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Professional, Civic and Community Involvement

- Arizona Supreme Court
  - Member, Attorney Regulation Advisory Committee (2011-present)
  - Member, Attorney Discipline Task Force (2009-2010)
- State Bar of Arizona
  - Ethics Committee (2002-present)
  - Chairman (2009-2011)
- Mesa Judicial Advisory Board
  - Member (2007-2010)
  - Chairman (2009-2010)
- Arizona Equal Justice Foundation, Board Member (2010-present)
- Arizona State University Alumni Association, Board of Directors (2010-present)
- Arizona Town Hall
  - Chair-Elect (2012 – 2013)
- Mesa 2025: Financing the Future
  - Citizen Committee Member (2005-2006)
- Mesa Leadership Training & Development, Class of 2002

- Acting Honorary Consul for France (2001-2003)
- Member, Association of Professional Responsibility Lawyers
- Member, American Bar Association
- Member, Center for Professional Responsibility

Admitted to Practice

- Arizona
- U.S. District Court, District of Arizona
- U.S. Court of Appeals, Ninth Circuit

Education

- J.D., Arizona State University College of Law, cum laude (1995)
  - Executive Managing Editor, Arizona State Law Journal
  - Alan A. Matheson Award
- B.A., Yale University, English, cum laude, with Distinction (1980)

Foreign Languages

- French (Fluent)

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RELATED SERVICES

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Professional Liability Litigation

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Related Publications

James R. Condo | Partner

Jim Condo has a national and regional trial practice concentrated in complex commercial, professional and product liability litigation. He serves as co-chair of Snell & Wilmer's Commercial Litigation Practice Group and also holds the position of Primary Loss Prevention Partner with responsibility for counseling the firm's lawyers in professional liability matters.

Representative Experience

View

Education

- Boston College Law School, Newton, MA (J.D., *cum laude*, 1979)
  - Managing Editor, *Boston College Law Review* (1978-1979)
- Lehigh University, Bethlehem, PA (B.S., with honors, Business and Economics, 1974)

Court Admissions

- Supreme Court of Arizona
- Supreme Court of Colorado
- United States Supreme Court
- United States District Court, District of Arizona
- United States Court of Appeals, Fourth Circuit
- United States Court of Appeals, Sixth Circuit
- United States Court of Appeals, Ninth Circuit
- United States Court of Appeals, Tenth Circuit
- United States Court of Appeals, District of Columbia Circuit

Professional Memberships & Activities

- Judge Pro Tempore, Superior Court, Maricopa County, Arizona
- Former Judge Pro Tempore, Arizona Court of Appeals

Professional Recognition & Awards

- Litigation Counsel of America™, Fellow (2012)
- *The Best Lawyers in America®*, Bet-the-Company Litigation, Commercial Litigation, Construction Litigation, Legal Malpractice Law - Defendants (2003-2012)
- *The Best Lawyers in America®*, Business Edition, Bet-the-Company, Legal Malpractice Law - Defendants (2012)
- *Chambers USA*: America's Leading Lawyers for Business®, Litigation: General Commercial (2003-2011)
- *Southwest Super Lawyers®*, Business Litigation (2007-2012)
- *Super Lawyers®*, Business Litigation - Business Edition (2011)
- *Super Lawyers®*, Business Litigation - Corporate Counsel Edition (2008-2010)

- *Ranking Arizona: The Best of Arizona Attorneys*, Commercial Litigation (2010-2011)
- Arizona's Finest Lawyers (2011)

Community Involvement

- Arizona Town Hall
  - Board of Directors (1996-2000; 2005-2009); Ex-Officio Member (2009-2011)
  - Chairman of the Board (2007-2009)
- National Leadership Council, Lehigh University (2005-2010)

Member
Commercial Litigation Practice Group
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Gregory W. Falls

SHERMAN&HOWARD

AREAS OF EMPHASIS

- Administrative Law & Litigation
- Alternative Dispute Resolution
- Bankruptcy & Insolvency
- Commercial Litigation
- Real Estate

SUMMARY

Gregory W. Falls is a member of Sherman & Howard's Commercial Litigation Department and has over 25 years of experience handling all facets of commercial and contract litigation. His representative matters include acting as litigation counsel for companies, organizations and individuals who are or may become involved in litigation in state and federal court, private arbitration proceedings and mediation, and bankruptcy proceedings, where such clients are financial institutions and other lenders, borrowers and guarantors involved in real property contracts and other commercial transactions, loans, loan workouts, contract and loan modification negotiations, and related commercial litigation.

REPRESENTATIVE MATTERS

- Represented national purchaser of mortgage loans in successful defense of District Court lawsuit challenging the validity of deeds of trust given as security for promissory notes, which had been securitized and sold in the secondary mortgage market.
- Represented private investor in successful defense of Bankruptcy Court litigation claiming the redemption of the investor's interest in a limited liability company was a fraudulent conveyance or should be voided under principles of statutory and equitable subordination.
- Represented individual investor and his company in successful defense of Bankruptcy Court litigation claiming fraudulent conveyances and that company was the alter ego of a bankrupt debtor and should be consolidated in bankruptcy with the debtor.
- Representative matters include acting as litigation counsel for companies, other organizations and individuals who are or may become involved in litigation in state and federal court, private arbitration proceedings and mediation, and bankruptcy proceedings, where such clients are financial institutions and other lenders, borrowers and guarantors involved in real property contracts and other commercial transactions, loans, loan workouts, contract and loan modification negotiations, and related commercial litigation.
- Represented hard money lender in defense of lender liability claims in Arizona Superior Court, foreclosure proceedings and negotiated settlement in connection with loans secured by improved subdivided lots.
- Represented lender in foreclosure proceedings and deficiency action in Arizona Superior Court and negotiated settlement in connection with loans to related entities secured by parcels of unimproved real estate located in Arizona and other states.
- Represented national association in litigation in the Arizona Superior Court, Court of Appeals, and Supreme Court in connection with laws and contracts providing for tax incentive financing.
- Represented public company in arbitration proceedings before the American Arbitration Association for the purpose of enforcing a contract to purchase approximately 2,000 acres of improved lots.
- Represented homebuilder in defense of arbitration class action before the American Arbitration Association arising out of alleged defective construction of homes located in several Arizona subdivisions.

- Represented lender in litigation for exception from discharge in Bankruptcy Court, District Court and United States Court of Appeals.
- Represented title company as plaintiff in Arizona Superior Court, Court of Appeals, and Supreme Court in action for racketeering in connection with forged documents presented to lender on property acquisition and development loan.

PROFESSIONAL ACTIVITIES

- Admitted Arizona, 1987
- Admitted to practice before the United States District Court District of Arizona, 1987 and U.S. Court of Appeals for the Ninth Circuit, 1997
- Member, The Federalist Society for Law and Public Policy Studies
- Member, State Bar of Arizona, Bankruptcy and Real Property Sections
- Director, University of Arizona James E. Rogers Law College Association Board
- Member, Association for Corporate Growth (ACG), Phoenix Chapter
- Director, Chair of Training Committee and Executive Committee Member, Arizona Town Hall Board
- Recorder, Arizona Town Hall, October 1995, October 1996 and October 2008
- Report Chair, Tucson Regional Town Hall, May 2007
- Report Chair, Arizona Town Hall, October 1997, May 2002 and May 2003

PUBLICATIONS AND PRESENTATIONS

- Speaker, Residential Construction Business Practices, Del E. Webb School of Construction, Arizona State University, October 2008
- Speaker, Arizona's Employers Sanctions Law, May 2008
- Speaker, Lending and Bankruptcy Issues, Continuing Legal Education for the State Bar of Arizona and Maricopa County Bar Association

EDUCATION

- Juris Doctor, with distinction, University of Arizona James E. Rogers College of Law, 1986
  Member, Arizona Law Review
- Bachelor of Science in Production-Operations Management, W.P. Carey School of Business, Arizona State University, 1983

HONORS

- Recognized in Southwest Super Lawyers, 2008 & 2010
- Top 50 Pro Bono Attorneys of Arizona Award, Arizona Bar Foundation, 2002
- Maricopa County Volunteer Lawyers' Program Attorney of the Month, July 2001

Sharon Flanagan-Hyde, MA, President, Flanagan-Hyde Solutions, LLC

Sharon Flanagan-Hyde provides consulting services to nonprofit organizations, foundations, government agencies, and businesses that work in the areas of health, human services, education, and law. Prior to founding Flanagan-Hyde Solutions 2003, she was vice president and chief operating officer of a national health care market research and strategic planning firm. Her expertise, developed over more than 30 years, includes community capacity building; nonprofit board development and executive coaching; strategic planning; communication and leadership training; facilitation of meetings, retreats, and communities of practice (including graphic facilitation); program development and management; organizational development; quantitative and qualitative research design, fielding, and analysis; focus group moderation and reporting; technical, grant, and consumer writing; and policy analysis. She is a St. Luke's Health Initiatives Technical Assistance Partnership (TAP) consultant. Sharon holds a master's in organizational change from Prescott College, Prescott, AZ and a BA from Williams College, Williamstown, MA. She is an IABC-accredited business communicator.

Chip U'Ren
Salt River Project (Retired)

Chip U'Ren joined Salt River Project in April of 1990 as Associate General Manager, a position he held until retiring in July 2007. Prior to joining SRP, Mr. U'Ren spent 15 years as president of the consulting firm U'Ren & Nosky, Inc., and was a senior executive with Valley National Bank from 1964 to 1974. Through his firm U'Ren & Associates, Inc., Mr. U'Ren continues to be active professionally, speaking on the subjects of leadership and organizational excellence and providing advisory services to businesses and their leaders.

Mr. U'Ren has been active in numerous industry and community non-profit organizations. He is past chair and serves on the boards of Arizona Town Hall, St. Luke's Health Initiatives and Maricopa Community Colleges Foundation. He previously served as chair of the Phoenix Symphony, Maricopa Partnership for Arts and Culture and the Western Energy Institute. He serves on the Arizona Bioscience Roadmap Steering Committee and previously served on the University of Arizona Business School National Board of Advisors, Northern Arizona University Presidents Advisory Council, and the boards of the ASU College of Fine Arts, Men's Arts Council and the Men's Anti-Violence Network

Mr. U'Ren was raised in Arizona and holds a management degree from the University of Arizona. In addition to his professional engagements and community vovlunteer work, Mr. U'Ren pursues his personal interest in creating functional and abstract fabricated metal sculpture.

OVERVIEW OF THE ARIZONA TOWN HALL PROCESS

Arizona Town Hall is a private nonprofit corporation founded in 1962 for the purpose of identifying and discussing critical policy issues facing Arizona and creating solutions. Much of the success of the Arizona Town Halls lies in the fact that the process incorporates the knowledge, thoughts and ideas of all the participants. The Town Hall process has been adapted and utilized by many other groups who strive to create solutions by drawing upon diverse views and building informed coalitions.

Panel Discussions

The Town Hall begins with panel discussions. Each panel addresses the same Discussion Outline during the first portion of the Town Hall. The process and guiding principles for the panel discussions are as follows:

- The Panel Chair reads one question at a time and discussion follows.
- It is important to stick to the question at hand.
- The panel strives for consensus (votes are taken only if absolutely necessary).
- Consensus is reached when no one wants to add anything, and no one objects strongly to the wording offered.
- The recorder's role is to keep the panel on time, capture the consensus comments, read back consensus statements to the panel and make edits with participants.
- Viewpoints of all participants are considered equally valuable, regardless of title or formal position.
- Discussions are encouraged to be robust while maintaining a respect for different viewpoints. Participants are allowed to criticize concepts—not people.
- Minority viewpoints must be very strong to find their way into the final document (at least 1/3 of the total group).
- Media will be present at the Town Hall and may be in attendance during panel discussions. You should assume that your comments may be quoted at any time.
- Observers may attend the sessions but cannot participate or contribute to discussions.
- The process is as valuable as the recommendations.

Creation of the Draft Recommendations Report

Once complete, the consensus statements are taken from each panel to the Report Chairs. The Report Chairs review the statements from all five panels and looks for consensus across all of the groups. With assistance from the Panel Recorders, the Report Chairs create a draft report of what appears to be the consensus of the Town Hall participants.

The draft report is distributed early in the morning before the plenary session on the Wednesday of each Town Hall. Panels meet prior to the start of the plenary session to review the draft and outline any areas the panel wants to address at the plenary session.

The Plenary Session

At the plenary session, Arizona Town Hall's Chairman of the Board leads all of the Town Hall participants, as a full body, in an organized review of the document. All participants work to approve, amend or reject each section of the report of recommendations.

OVERVIEW OF THE DOWNTOWN SCOTTSDALE TOWN HALL

The Town Hall mechanism will involve three debating panels. Participants will be divided equally between the three panels and each panel will follow the same Discussion Outline. This Discussion Outline will be sent to all participants shortly before the Town Hall session so that everyone knows the particular questions that will be posed for consideration.

The Downtown Scottsdale Town Hall workbook is an excellent document for giving you broad background information on the topic at large, but it is not intended to be an outline for the panel discussions. Part of the success of the Town Halls lies in the fact that they are not just a textbook exercise.

Each panel will be facilitated by a Panel Chair. Each panel will also have a Recorder. The Recorder listens to the discussion and drafts the consensus opinion of the panel while the discussion takes place. When the Panel Chair believes that the Recorder has documented the consensus of the group, the Recorder reads the statement to the group.

The consensus statements of each panel are collected by the staff of Arizona Town Hall and given to the Report Chair. The Report Chair synthesizes the consensus statements of all three panels into one document (the draft report) which is intended to reflect the consensus of all three panels.

After each discussion, panel recorders meet with the Report Chair to review and edit the draft report. A draft of the final document will be distributed to all participants before the plenary session on Monday, November 20.

Panels will meet prior to the start of the plenary session to review the draft and outline any areas the panel wants to address at the plenary session. If a concept did not make it into the final draft, the panel may formulate language to offer at the plenary session if the concept was considered during the previous two days of discussions and was a consensus of the panel.

- **At the plenary session the participants of the Downtown Scottsdale Town Hall, as a full body, will review the document in an organized approach considering the major issues**
- **There should be no regeneration of an issue by a single individual. If an idea was not agreed to by a panel, it should not be brought up again at the plenary session.**
- **All participants work to approve, amend or reject each section of the report.**

EXPECTATIONS OF PANEL DISCUSSIONS

- **To have a thorough, informal discussion on each question.**
- **To arrive at consensus regarding each question.**
- **To cover all of the questions within the time allotted.**
- **To benefit from the discussion process.**
- **To have an informative and enjoyable experience.**

PROCESS AND GUIDING PRINCIPLES OF PANEL DISCUSSIONS

- **Chair will read one question at a time and discussion will follow.**
- **Stick to the question at hand.**
- **Strive for consensus. Very few, if any, votes will be allowed.**
- **Consensus is reached when no one wants to add anything, and no one objects strongly to the wording offered.**
- **The Recorder's role is to keep the panel on time, capture the consensus comments, read consensus statements and edit when applicable.**
- **Participants should avoid jargon.**
- **Participants should discuss concepts, not people.**
- **Minority viewpoints must be very strong to find their way into the final document (at least 1/3 of the group).**
- **Resource consultants may visit the panel discussions.**
- **Observers may observe but cannot participate or contribute to discussions.**
- **The process is as valuable as the recommendations.**

99TH ARIZONA TOWN HALL

"ARIZONA'S ENERGY FUTURE"

GRAND CANYON, ARIZONA

November 6-9, 2011

SUNDAY, NOVEMBER 6

3:00 – 6:00 p.m.	Registration (Lobby, El Tovar Hotel)
6:00 – 7:00 p.m.	Social hour (Lobby, El Tovar Hotel)
7:00 p.m.	Opening Dinner & Orientation (Main Dining Rm., El Tovar Hotel) **Ron Walker**, Board Chair, and **Tara Jackson**, President;

MONDAY, NOVEMBER 7

7:00 a.m. -- 8:00 a.m.	Buffet Breakfast (Maswik Lodge) **Key Concepts from the Youth Town Hall**: Panel presentation by students attending the Youth Town Hall on October 12th
8:30 a.m. – Noon	Panel Discussions (all participants – various locations)
12:30 p.m. – 2:00 p.m.	Luncheon (Dining Room, El Tovar Hotel):
	Remarks by Governor Jan Brewer by videotape
	Key Facts You Need to Know: Panel presentation by authors of the 99th Arizona Town Hall Background Report
2:30 p.m. – 5:00 p.m.	Continuation of panel discussions (various locations)
6:00 p.m. – 7:00 p.m.	Social hour (Maswik Lodge)
7:00 p.m.	Dinner (Santa Fe Dining Room, Maswik Lodge): **Elisabeth Graffy** of the University of Wisconsin-Madison

TUESDAY, NOVEMBER 8

	Breakfast on your own
7:00 a.m. – 8:00 a.m.	Optional Ranger-guided walk (meet in El Tovar Lobby)
8:30 a.m. – Noon	Continuation of panel discussions (various locations)
12:30 p.m. – 2:00 p.m.	Luncheon (Santa Fe Dining Room, Maswik Lodge): **Tara Jackson,** President, Arizona Town Hall and **Members of the Arizona Town Hall Board**
	Special musical presentation by Northern Arizona University
2:30 p.m. – 5:00 p.m.	Continuation of panel discussions (various locations)
6:30 p.m. . – 8:00 p.m.	Wine, Cheese and Buffet Reception; Recognition of Students

WEDNESDAY, NOVEMBER 9

6:45 – 8:15 a.m.	Individual panel caucuses (various locations)
8:30 a.m. to approx. 12:30 p.m.	Plenary Session (Santa Fe Dining Room, Maswik Lodge)
	Adjournment

100TH ARIZONA TOWN HALL
"CIVIC ENGAGEMENT"
TUCSON, ARIZONA
APRIL 22-25, 2012

SUNDAY, APRIL 22

3:00 – 6:00 p.m.	Registration
6:00 – 7:00 p.m.	Social hour
7:00 p.m.	Opening Dinner & Orientation **Ron Walker**, Board Chair, and **Tara Jackson**, President

MONDAY, APRIL 23

7:00 a.m. -- 8:00 a.m.	Breakfast Buffet **Key Facts You Need to Know:** Panel presentation by authors of the 100th Arizona Town Hall Background Report
8:30 a.m. – Noon	Panel Discussions (all participants)
12:30 p.m. – 2:00 p.m.	Luncheon: Remarks by Governor **Jan Brewer** or representative (Tentative) **Christopher T. Gates,** Executive Director PACE-Philanthropy for Active Civic Engagement
2:30 p.m. – 5:00 p.m.	Continuation of panel discussions
6:00 p.m. – 7:00 p.m.	Social hour
7:00 p.m.	Dinner: **Jim Kolbe,** former U.S. Representative for Arizona's 8th congressional district; Fellow at the German Marshall Fund think tank and consultant at Kissinger McLarty Associates

TUESDAY, APRIL 24

8:30 a.m. – Noon	Continuation of panel discussions
12:30 p.m. – 2:00 p.m.	Luncheon: **Special musical entertainment** **"What Happens Now?"** Members of the Arizona Town Hall Board
2:30 p.m. – 5:00 p.m.	Continuation of panel discussions
6:30 p.m. – 8:00 p.m.	Buffet-style dinner, Old Pueblo Grille patio, Special recognition of student participants

WEDNESDAY, APRIL 25

6:45 – 8:15 a.m.	Individual panel caucuses
8:30 a.m. to approx. 12:30 p.m.	Plenary Session
	Adjournment

REGIONAL OFFICE INSTRUCTION SHEET

POLICY NUMBER: 59 SBA VN7227 SC

ROUTING INSTRUCTIONS

_SEND TO RECORDS. TRANSFER CORR IF APPLICABLE.

POLICY FACE SHEET

27
72 INSURED:
VN HARTFORD CASUALTY INSURANCE COMPANY
SBA

POLICY NO. 59 SBA VN7227 SC RECORDS RETENTION - PERMANENT

DECLARATIONS
ITEMS

1. NAMED INSURED AND MAILING ADDRESS:

ARIZONA TOWN HALL INC
ATTN: TARA JACKSON
1 E. CAMELBACK RD. #530
PHOENIX, MARICOPA
AZ. 85012

2. POLICY PERIOD:

06/01/12	06/01/13	1
INCEPTION	EXPIRATION	YEAR

AGENT'S CODE: 303048
AGENT'S NAME: LOW & JOHNSON INC

PREVIOUS POLICY NO. 59 SBA VN7227

3. THE NAMED INSURED IS: CORP

POLICY STATUS: ACTIVE
LOB LEVEL OF SUPPORT: SP-S
MARKET SEGMENTATION: 940

SELECT CUSTOMER
DIRECT ACCOUNT BILL NUMBER - 12565037
DEDUCTIBLE
ADDITIONAL INSURED(S)

ABBREVIATED AUTOMATICALLY BOOKED POLICY ISSUED AUTOMATICALLY RENEWED

TRANS TYPE: RENL CNTL#: 001
POLICY FACE SHEET TERMINAL ID: P4SCR45A PAGE 2
04/16/12 59 SBA VN7227 SC (06/01/13)

27 This **Spectrum Policy** consists of the Declarations, Coverage Forms, Common Policy Conditions and any
72 other Forms and Endorsements issued to be a part of the Policy. This insurance is provided by the stock
VN insurance company of The Hartford Insurance Group shown below.
SBA

INSURER: HARTFORD CASUALTY INSURANCE COMPANY
HARTFORD PLAZA, HARTFORD, CT 06115
COMPANY CODE: 3

Policy Number: 59 SBA VN7227 SC

SPECTRUM POLICY DECLARATIONS

Named Insured and Mailing Address:
(No., Street, Town, State, Zip Code)

ARIZONA TOWN HALL INC
ATTN: TARA JACKSON
1 E. CAMELBACK RD. #530
PHOENIX AZ 85012

Policy Period: **From** 06/01/12 **To** 06/01/13 1 YEAR
12:01 a.m., Standard time at your mailing address shown above. **Exception:** 12 noon in New Hampshire.

Name of Agent/Broker: LOW & JOHNSON INC
Code: 303048

Previous Policy Number: 59 SBA VN7227

Named Insured is: CORPORATION

Audit Period: NON-AUDITABLE

Type of Property Coverage: SPECIAL

Insurance Provided: In return for the payment of the premium and subject to all of the terms of this policy, we agree with you to provide insurance as stated in this policy.

TOTAL ANNUAL PREMIUM IS: $633

Countersigned by _____
Authorized Representative Date

SPECTRUM POLICY DECLARATIONS (Continued)

POLICY NUMBER: 59 SBA VN7227

Location(s), Building(s), Business of Named Insured and Schedule of Coverages for Premises as designated by Number below.

Location: 001 **Building:** 001

1 E. CAMELBACK RD. #530
PHOENIX AZ 85012

Description of Business:
ASSOCIATION - CIVIC NON PROFIT

Deductible: $ 500 PER OCCURRENCE

BUILDING AND BUSINESS PERSONAL PROPERTY	LIMITS OF INSURANCE
BUILDING	
	NO COVERAGE
BUSINESS PERSONAL PROPERTY	
REPLACEMENT COST	$ 62,500
PERSONAL PROPERTY OF OTHERS	
REPLACEMENT COST	NO COVERAGE
MONEY AND SECURITIES	
INSIDE THE PREMISES	$ 10,000
OUTSIDE THE PREMISES	$ 5,000

Location(s), Building(s), Business of Named Insured and Schedule of Coverages for Premises as designated by Number below.

Location: 001 **Building:** 001

PROPERTY OPTIONAL COVERAGES APPLICABLE TO THIS LOCATION	LIMITS OF INSURANCE
STRETCH COVERAGES FORM: SS 04 08 THIS FORM INCLUDES MANY ADDITIONAL COVERAGES AND EXTENSIONS OF COVERAGES. A SUMMARY OF THE COVERAGE LIMITS IS ATTACHED.	
LIMITED FUNGI, BACTERIA OR VIRUS COVERAGE: FORM SS 40 93 THIS IS THE MAXIMUM AMOUNT OF INSURANCE FOR THIS COVERAGE, SUBJECT TO ALL PROPERTY LIMITS FOUND ELSEWHERE ON THIS DECLARATION.	$ 50,000
INCLUDING BUSINESS INCOME AND EXTRA EXPENSE COVERAGE FOR:	30 DAYS

PROPERTY OPTIONAL COVERAGES APPLICABLE TO ALL LOCATIONS	LIMITS OF INSURANCE
BUSINESS INCOME AND EXTRA EXPENSE COVERAGE	12 MONTHS ACTUAL LOSS SUSTAINED
COVERAGE INCLUDES THE FOLLOWING COVERAGE EXTENSIONS:	
ACTION OF CIVIL AUTHORITY:	30 DAYS
EXTENDED BUSINESS INCOME:	30 CONSECUTIVE DAYS
EMPLOYEE DISHONESTY: FORM SS 04 42	
DEDUCTIBLE: $ 100	
EACH OCCURRENCE	$ 30,000
EQUIPMENT BREAKDOWN COVERAGE	
COVERAGE FOR DIRECT PHYSICAL LOSS DUE TO:	
MECHANICAL BREAKDOWN, ARTIFICIALLY GENERATED CURRENT AND STEAM EXPLOSION	
THIS ADDITIONAL COVERAGE INCLUDES THE FOLLOWING EXTENSIONS	
HAZARDOUS SUBSTANCES	$ 50,000
EXPEDITING EXPENSES	$ 50,000
MECHANICAL BREAKDOWN COVERAGE ONLY APPLIES WHEN BUILDING OR BUSINESS PERSONAL PROPERTY IS SELECTED ON THE POLICY	
IDENTITY RECOVERY COVERAGE FORM SS 41 12	$ 15,000

BUSINESS LIABILITY	LIMITS OF INSURANCE
LIABILITY AND MEDICAL EXPENSES	$1,000,000
MEDICAL EXPENSES - ANY ONE PERSON	$ 10,000
PERSONAL AND ADVERTISING INJURY	$1,000,000
DAMAGES TO PREMISES RENTED TO YOU ANY ONE PREMISES	$ 300,000
AGGREGATE LIMITS PRODUCTS-COMPLETED OPERATIONS	$2,000,000
GENERAL AGGREGATE	$2,000,000
EMPLOYMENT PRACTICES LIABILITY COVERAGE: FORM SS 09 01	
EACH CLAIM LIMIT	$ 5,000
DEDUCTIBLE - EACH CLAIM LIMIT NOT APPLICABLE	
AGGREGATE LIMIT	$ 5,000
RETROACTIVE DATE: 06012009	

This **Employment Practices Liability Coverage** contains claims made coverage. Except as may be otherwise provided herein, specified coverages of this insurance are limited generally to liability for injuries for which claims are first made against the insured while the insurance is in force. Please read and review the insurance carefully and discuss the coverage with your Hartford Agent or Broker.

The Limits of Insurance stated in this Declarations will be reduced, and may be completely exhausted, by the payment of "defense expense" and, in such event, The Company will not be obligated to pay any further "defense expense" or sums which the insured is or may become legally obligated to pay as "damages".

BUSINESS LIABILITY OPTIONAL COVERAGES

HIRED/NON-OWNED AUTO LIABILITY FORM: SS 04 38	$1,000,000

ADDITIONAL INSUREDS: THE FOLLOWING ARE ADDITIONAL INSUREDS FOR BUSINESS LIABILITY COVERAGE IN THIS POLICY.

LOCATION 001 BUILDING 001

TYPE MANAGER LESSOR

NAME CUSHMAN & WAKEFIELD OF ARIZONA, INC
PHOENIX AZ 85012

Form Numbers of Forms and Endorsements that apply:

SS 00 01 04 93	SS 00 05 12 06	SS 00 07 07 05	SS 00 08 04 05
SS 84 01 09 07	SS 01 54 07 11	SS 04 08 09 07	SS 04 19 07 05
SS 04 22 07 05	SS 04 30 07 05	SS 04 38 09 09	SS 04 39 07 05
SS 04 41 04 09	SS 04 42 09 07	SS 04 44 07 05	SS 04 45 07 05
SS 04 46 10 08	SS 04 47 04 09	SS 04 80 03 00	SS 04 86 03 00
SS 40 18 07 05	SS 40 93 07 05	SS 41 12 12 07	SS 41 51 10 09
SS 41 62 06 11	SS 41 63 06 11	IH 10 01 09 86	SS 05 47 09 01
SS 05 64 12 10	SS 50 57 04 05	SS 09 01 10 08	SS 09 03 10 08
SS 09 42 07 99	SS 40 23 03 00	SS 50 19 03 12	IH 99 40 04 09
IH 99 41 04 09	SS 38 25 12 07	SS 83 76 03 12	

STRETCH SUMMARY

SUMMARY OF COVERAGE LIMITS

This is a summary of the Coverages and the Limits of Insurance provided by the Stretch Coverage form SS 04 08 which is included in this policy. No coverage is provided by this summary. Refer to coverage form SS 04 08 to determine the scope of your insurance protection.

The Limit of Insurance for the following Additional Coverages are in addition to any other limit of insurance provided under this policy:

Coverage	**Limit**
Accounts Receivable – On/Off-Premises	$ 25,000
Brands and Labels	Up to Business Personal Property Limit
Claim Expenses	$ 10,000
Computer Fraud	$ 5,000
Computers and Media	$ 10,000
Debris Removal	$ 25,000
Employee Dishonesty (including ERISA)	$ 10,000
Fine Arts	$ 10,000
Forgery	$ 10,000
Laptop Computers – World-Wide Coverage	$ 5,000
Off Premises Utility Services – Direct Damage	$ 10,000
Outdoor Signs	Full Value
Pairs or Sets	Up to Business Personal Property Limit
Personal Property of Others	$ 10,000
Property at Other Premises	$ 10,000
Salespersons' Samples	$ 1,000
Sewer and Drain Back Up	Included up to Covered Property Limits
Sump Overflow or Sump Pump Failure	$ 15,000
Temperature Change	$ 10,000
Tenant Building and Business Personal Property Coverage-Required by Lease	$ 20,000
Transit Property in the Care of Carriers for Hire	$ 10,000
Unauthorized Business Card Use	$ 2,500
Valuable Papers and Records – On/Off-Premises	$ 25,000

The Limits of Insurance for the following Coverage Extensions are a replacement of the Limit of Insurance provided under the Standard Property Coverage Form or the Special Property Coverage Form, whichever applies to the policy:

Coverage	**Limit**
Newly Acquired or Constructed Property – 180 Days	
Building	$1,000,000
Business Personal Property	$ 500,000
Business Income and Extra Expense	$ 500,000
Outdoor Property	$ 20,000 aggregate/ $1,000 per item
Personal Effects	$ 25,000
Property Off-Premises	$ 15,000

The following changes apply only if Business Income and Extra Expense are covered under this policy. The Limits of Insurance for the following Business Income and Extra Expense Coverages are in addition to any other Limit of Insurance provided under this policy:

Coverage	**Limit**
Business Income Extension for Off-Premises Utility Services	$ 25,000
Business Income Extension for Web Sites	$ 10,000/7 days
Business Income from Dependent Properties	$ 25,000

The following Limit of Insurance for the following Business Income Coverage is a replacement of the Limit of Insurance provided under the Standard Property Coverage Form or the Special Property Coverage Form, whichever applies to the policy:

Coverage	**Limit**
Extended Business Income	60 Days

The following changes apply to Loss Payment Conditions:

Coverage	**Limit**
Valuation Changes	
Commodity Stock	Included
"Finished Stock"	Included
Mercantile Stock - Sold	Included

Named Insured: ARIZONA TOWN HALL INC

Policy Number: 59 SBA VN7227

Effective Date: 06/01/12 **Expiration Date**: 06/01/13

Company Name: LOW & JOHNSON INC

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

TRADE OR ECONOMIC SANCTIONS ENDORSEMENT

This insurance does not apply to the extent that trade or economic sanctions or other laws or regulations prohibit us from providing insurance, including, but not limited to, the payment of claims.

All other terms and conditions remain unchanged.

POLICY NUMBER: 59 SBA VN7227 SC

EFFECTIVE DATE: 06/01/12
MARKET SEGMENTATION: 940

COMMISSION: 15.0

LOCATION/BUILDING RATING DETAIL

TYPE OF POLICY CD	DESCRIPTION	PROT CLS CURR/PRV	HAZ: N/A CONSTR	STAT CODE	TERR	AREA	ANNUAL SALES/RECPT
7	OFFICE	02/02	3-NON-COMB	49221	001	1845	251327

YR BUILT
1985

LOC 001 BLDG 001

1 E. CAMELBACK RD. #530, PHOENIX, AZ. 85012

BUSINESS PERSONAL PROPERTY OCCPY CD 15

ITV 4.5 PCT

(A).760 X (CE).95 X (G).94 X (SC).800 = ((P).543 X
(Q)62,500 / 100) + ((SX)215 X (G).94) X (PD).6 = 325.00

STRETCH ENDORSEMENT
(A)125 X (PD).6 = 75.00

COMMON COVERAGE INFORMATION

NON-OWNED AUTOMOBILE/HIRED CAR
(A)150.00 X (PD).6 = 90.00

EMPLOYEE DISHONESTY DEDUCTIBLE $100
(SL)218 X (PD).6 X (DD)1.00 = 131.00

TERRORISM PREMIUM
(JS)621.00 X (JR).02 = 12.00

GRAND TOTAL 633.00

A - BASE RATE
P - FINAL RATE
CE - CLASS FACTOR
JR - TERRORISM FACTOR
PD - PREMIUM DEVIATION
SL - CHARGE FOR 1 - 5 EMPLOYEES
G - DEDUCTIBLE FACTOR
Q - LIMIT OF LIABILITY
DD - EMPLOYEE DISHON DED FACTOR
JS - TOTAL POLICY PREMIUM
SC - SPRINKLER CREDIT
SX - ALL RISK LOADING

POLICY INFORMATION

NAMED INSURED: ARIZONA TOWN HALL INC
AGENT CODE AND NAME: 303048 LOW & JOHNSON INC
COMPANY CODE AND NAME: 3 HARTFORD CASUALTY INSURANCE COMPANY
EFFECTIVE DATE: 06/01/12 EXPIRATION DATE: 06/01/13
AUDIT PERIOD: NON-AUDITABLE

POLICY AUTOMATICALLY BOOKED

REPLACEMENT COST COVERAGE APPLIES

SPECTRUM PROPERTY DEDUCTIBLE: $500

COVERAGES	LIMITS OF LIABILITY	PREMIUMS
BUSINESS PERSONAL PROPERTY	$62,500	$325.00
BUSINESS INCOME AND EXTRA EXPENSE		INCLUDED
NON-OWNED AUTOMOBILE/HIRED CAR	$1,000,000	$90.00
EMPLOYEE DISHONESTY DEDUCTIBLE $100	$30,000	$131.00
BUSINESS LIABILITY	$1,000,000	INCLUDED
IDENTITY RECOVERY	$15,000	INCLUDED
EMPLOYMENT PRACTICES LIABILITY $5,000/	$5,000	INCLUDED
STRETCH ENDORSEMENT		$75.00
MONEY AND SECURITIES		
INSIDE-PREMISES	$10,000	
OUTSIDE-PREMISES	$5,000	INCLUDED
TERRORISM COVERAGE		$12.00
FUNGI LIMITED COVERAGE	$50,000	INCLUDED
FUNGI LIMITED BUSINESS INTERRUPTION	30 DAYS	INCLUDED
	TOTAL	$633.00

DIRECT ACCOUNT BILL NUMBER - 12565037

PRODUCER'S FACT SHEET

NAMED INSURED: ARIZONA TOWN HALL INC
ATTN: TARA JACKSON

POL #: 59 SBA VN7227 SC

PRODUCER'S NAME: PRODUCER'S CODE: 303048
LOW & JOHNSON INC

POL EFF DATE: 06/01/12 POL EXP DATE: 06/01/13

DIRECT ACCOUNT BILL NUMBER - 12565037

TRANSACTION TYPE: RENEWAL

TOTAL ANNUAL PREMIUM: $633.00
INCLUDES TERRORISM PREMIUM $12.00

COMMISSION BREAKDOWN

	ANNUAL PREMIUM	COMMISSION PERCENTAGE
SPECTRUM	$633.00	15.0
TOTAL	$633.00	

FORM	TITLE
SS 00 01 04 93	POLICY FRONT COVER
SS 00 02 12 06	SPECTRUM POLICY DECLARATIONS
SS 00 05 12 06	COMMON POLICY CONDITIONS
SS 00 07 07 05	SPECIAL PROPERTY COVERAGE FORM
SS 00 08 04 05	BUSINESS LIABILITY COVERAGE FORM
SS 84 01 09 07	STRETCH SUMMARY
SS 01 54 07 11	ARIZONA CHANGES
SS 04 08 09 07	STRETCH
SS 04 19 07 05	BUSINESS INCOME EXTENSION FOR OFF-PREMISES UTILITY SERVICES
SS 04 22 07 05	FINE ARTS
SS 04 30 07 05	TRANSIT COVERAGE- PROPERTY IN THE CARE OF CARRIERS FOR HIRE
SS 04 38 09 09	HIRED AUTO AND NON-OWNED AUTO
SS 04 39 07 05	ACCOUNTS RECEIVABLE
SS 04 41 04 09	COMPUTERS AND MEDIA
SS 04 42 09 07	EMPLOYEE DISHONESTY COVERAGE
SS 04 44 07 05	OUTDOOR SIGNS
SS 04 45 07 05	PERSONAL PROPERTY OF OTHERS
SS 04 46 10 08	TEMPERATURE CHANGE
SS 04 47 04 09	VALUABLE PAPERS AND RECORDS
SS 04 80 03 00	CRIME COMMON CONDITIONS AND EXCLUSIONS
SS 04 86 03 00	FORGERY COVERAGE
SS 40 18 07 05	OFF-PREMISES UTILITY SERVICES - DIRECT DAMAGE
SS 40 93 07 05	LIMITED FUNGI, BACTERIA OR VIRUS COVERAGE
SS 41 12 12 07	IDENTITY RECOVERY COVERAGE FOR BUSINESS OWNERS AND EMPLOYEES
SS 41 51 10 09	BUILDING LIMIT- AUTOMATIC INCREASE REVISION
SS 41 62 06 11	AMENDMENT OF EXCLUSIONS AND DEFINITION - PERSONAL AND ADVERTISING INJURY
SS 41 63 06 11	AMENDMENT - DEFINITION OF INSURED CONTRACT
IH 10 01 09 86	PERILS SPECIFICALLY EXCEPTED
SS 05 47 09 01	EXCLUSION - NUCLEAR ENERGY LIABILITY
SS 05 64 12 10	EXCLUSION OF COVERAGE FOR SPECIAL EVENTS

SS 50 57 04 05	EXCLUSION - FUNGI, BACTERIA AND VIRUSES
G-3418-0	PRODUCER COMPENSATION NOTICE
PC-374-0	IMPORTANT NOTICE TO POLICYHOLDERS
SS 09 01 10 08	EMPLOYMENT PRACTICES LIABILITY COVERAGE FORM (CLAIMS MADE)
SS 09 03 10 08	ARIZONA CHANGES EMPLOYEMENT PRACTICES LIABILITY
SS 09 42 07 99	EMPLOYMENT PRACTICES - EXCLUSION - PRIOR ACTS
SS 40 23 03 00	AMENDMENT OF LIQUOR LIABILITY EXCLUSION
SS 50 19 03 12	CAP ON LOSSES FROM CERTIFIED ACTS OF TERRORISM
100722REV9	DIRECT BILL INFORMATION
IH 99 40 04 09	U.S. DEPT OF THE TREASURY, OFFICE OF FOREIGN ASSETS CONTROL ("OFAC") ADVISORY NOTICE TO POLICYHOLDERS
IH 99 41 04 09	TRADE OR ECONOMIC SANCTIONS ENDORSEMENT
G-3187-0	IMPORTANT NOTICE TO OUR POLICYHOLDERS
SS 33 35 06 11	IMPORTANT NOTICE TO POLICYHOLDERS - BUSINESS LIABILITY AND UMBRELLA FORM CHANGES
SS 38 25 12 07	POLICYHOLDER NOTICE - IDENTITY RECOVERY COVERAGE
SS 83 76 03 12	DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE ACT
SS 83 80 03 12	DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE ACT

POLICYHOLDER NOTICE - ARIZONA

Date: 04/16/12

Policy Number: 59 SBA VN7227

Renewal Date: 06/01/12

Your Hartford Agent: LOW & JOHNSON INC

ARIZONA TOWN HALL INC
ATTN: TARA JACKSON
1 E. CAMELBACK RD. #530
PHOENIX AZ 85012

Dear Valued Hartford Insured,

Your current policy provided by The Hartford will expire shortly. The purpose of this notice is to advise you of changes to your policy upon renewal. This is not a bill. You will receive a separate bill for all or part of the premium due for your renewal policy.

A. Policy Premium

The premium for your renewal policy will increase from that charged on your current policy. The new premium for your policy for the upcoming term is indicated below. This premium amount is based on current information known to us and may be subject to change based on any additional information we may receive from you or your Hartford agent or broker.

Renewal Premium	= $	633.00
Amount of Increase	= $	9.00

B. Coverage Changes (if applicable)

Your policy for the upcoming term will include certain reductions or additional restrictions in coverage, as indicated by an (x) below.

( ) Increase in Deductible to:

( ) Reduction in Limits to:

(X) Reductions in Coverage: REFER TO SS 33 35 - POLICYHOLDER NOTICE BUSINESS LIABILITY AND UMBRELLA FORM CHANGES

( ) Other Changes or Restrictions in Coverage:

You may receive other notices of coverage changes for the upcoming policy term under separate cover. Those other changes will apply in addition to the changes described above.

If you would like more information about this notice or your policy, please contact your Hartford agent or broker, or you may contact us directly. We look forward to continuing our relationship and fulfilling your insurance needs.

THIS ENDORSEMENT IS ATTACHED TO AND MADE PART OF YOUR POLICY IN RESPONSE TO THE DISCLOSURE REQUIREMENTS OF THE TERRORISM RISK INSURANCE ACT.

DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE ACT

SCHEDULE

Terrorism Premium (Certified Acts):

$ $12.00

A. Disclosure Of Premium

In accordance with the federal Terrorism Risk Insurance Act, as amended ("TRIA"), we are required to provide you with a notice disclosing the portion of your premium, if any, attributable to coverage for certified acts of terrorism under TRIA. The portion of your premium attributable to such coverage is shown in the Schedule of this endorsement.

B. Disclosure Of Federal Share Of Terrorism Losses

The United States Department of the Treasury will reimburse insurers for 85% of that portion of insured losses attributable to "certified acts of terrorism" under TRIA that exceeds the applicable insurer deductible.

However, if aggregate industry insured losses under TRIA exceed $100 billion in a Program Year (January 1 through December 31), the Treasury shall not make any payment for any portion of the amount of such losses that exceeds $100 billion. The United States government has not charged any premium for their participation in covering terrorism losses.

C. Cap On Insurer Liability for Terrorism Losses

If aggregate industry insured losses attributable to "certified acts of terrorism" under TRIA exceed $100 billion in a Program Year (January 1 through December 31) and we have met, or will meet, our insurer deductible under TRIA, we shall not be liable for the payment of any portion of the amount of such losses that exceed $100 billion. In such case, your coverage for terrorism losses may be reduced on a pro-rata basis in accordance with procedures established by the Treasury, based on its estimates of aggregate industry losses and our estimate that we will exceed our insurer deductible. In accordance with the Treasury's procedures, amounts paid for losses may be subject to further adjustments based on differences between actual losses and estimates.

D. All other terms and conditions remain the same.

IMPORTANT NOTICE TO POLICYHOLDERS

This Notice does not form a part of your policy. This is a summary of the changes to endorsements that may form a part of your policy. This notice does not reference every editorial change made in the endorsements. No coverage is provided by this summary, nor can it be construed to replace any provisions of your policy or endorsements. If there is any conflict between the policy and this summary, the provisions of the policy shall prevail.

Please read the policy carefully to determine rights, duties and coverage. Only the provisions of your policy determine the scope of your insurance protection.

The changes described below are general in nature. Your policy may contain further changes or modifications, so it remains necessary for you to read your policy closely. Please contact your agent or broker for further information.

BUSINESS LIABILITY COVERAGE FORM

If this coverage form is part of your Hartford policy, this notice applies to you. Please read it carefully.

SS 41 62 06 11 - Amendment of Exclusions and Definition – Personal and Advertising Injury

When this endorsement is attached to your policy, Personal and Advertising Injury Liability is changed as follows:

In order to elaborate on the intent of the current exclusion for Infringement Of Intellectual Property Rights, that exclusion has been revised to state that there is no coverage under personal and advertising injury for any injury or damage alleged in any claim or suit that also alleges an infringement or violation of any intellectual property right.

The scope of the Discrimination exclusion has been expanded to include sole proprietors ("your direction") and any other owner, manager or trustee who may direct such discrimination. This may be considered a reduction in coverage.

The Employment-Related Practices Exclusion is revised to reinforce that coverage is not provided for any injury to a person associated with the employment of that person, whether it occurs before employment, during employment, or after employment of that person. While this change is a reinforcement of coverage intent, it may result in a decrease in coverage in jurisdictions where courts have ruled the exclusion to be inapplicable in employment-related post-employment claims.

Under the definition of "personal and advertising injury", coverage for wrongful eviction now applies to wrongfully-evicted persons **or organizations**. This change results in a broadening of coverage.

SS 40 26 06 11 - Cyberflex Coverage

When this endorsement is attached to your policy, changes to the form to elaborate on the intent of the current provisions of the form. The exclusion Infringement of Intellectual Property Rights has been revised to state that there is no coverage under personal and advertising injury for any injury or damage alleged in any claim or suit that also alleges an infringement or violation of any intellectual property right.

We have amended the definition of "your web site", to state that "your web site" or set of interconnected web pages prepared and maintained by you, or by others on your behalf, for the purpose of promoting your goods, products or services, that is accessible over the internet.

SS 50 94 06 11 – Personal and Advertising Injury Exclusion – Copyright Material

When this endorsement is attached to your policy, it reinforces that the Personal And Advertising Injury provision **p.(7)(a)** that was amended on this form supersedes any provision to the contrary.

SS 41 63 06 11 – Amendment – Definition of Insured Contract

When this endorsement is attached to your policy, it removes "provided the "bodily injury" or property damage" is caused, in whole or in part by you or by those acting on your behalf" from the definition of an Insured Contract. This aligns the definition of an Insured Contract with ISO to protect the insured in an indemnitee agreement that requires them to indemnify and hold harmless another party from that party's own liability.

UMBRELLA POLICY PROVISIONS

If this coverage form is part of your Hartford policy, this notice applies to you. Please read it carefully.

SX 24 33 06 10 – Amendment Of Coverage – Personal And Advertising Injury

When this endorsement is attached to your policy, coverage is changed as follows:

In order to elaborate on the intent of the current exclusion for Infringement Of Intellectual Property Rights, that exclusion has been revised to state that there is no coverage under personal and advertising injury for any injury or damage alleged in any claim or suit that also alleges an infringement or violation of any intellectual property right.

The scope of the Discrimination exclusion has been expanded to include sole proprietors ("your direction") and any other owner, manager or trustee who may direct such discrimination. This may be considered a reduction in coverage.

Under the definition of "personal and advertising injury", coverage for wrongful eviction now applies to wrongfully-evicted persons **or organizations**. This change results in a broadening of coverage.

Finally, if form SS 40 26 is part of your underlying insurance, we have amended the definition of "your web site", to state that "your web site" means a web page or set of interconnected web pages prepared and maintained by you, or by others on your behalf, for the purpose of promoting your business or promoting your goods, products or services, that is accessible over an internet.

Should you have any questions, please contact your insurance agent, broker or representative.

Policy Number: 59 SBA VN7227

IMPORTANT NOTICE TO POLICYHOLDERS

DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE ACT

SCHEDULE

Terrorism Premium (Certified Acts):

$ $12.00

A. Disclosure Of Premium

In accordance with the federal Terrorism Risk Insurance Act, as amended ("TRIA"), we are required to provide you with a notice disclosing the portion of your premium, if any, attributable to coverage for certified acts of terrorism under TRIA. The portion of your premium attributable to such coverage is shown in the Schedule of this endorsement.

B. Disclosure Of Federal Share Of Terrorism Losses

The United States Department of the Treasury will reimburse insurers for 85% of that portion of insured losses attributable to "certified acts of terrorism" under TRIA that exceeds the applicable insurer deductible.

However, if aggregate industry insured losses under TRIA exceed $100 billion in a Program Year (January 1 through December 31), the Treasury shall not make any payment for any portion of the amount of such losses that exceeds $100 billion. The United States government has not charged any premium for their participation in covering terrorism losses.

C. Cap On Insurer Liability for Terrorism Losses

If aggregate industry insured losses attributable to "certified acts of terrorism" under TRIA exceed $100 billion in a Program Year (January 1 through December 31), and we have met, or will meet, our insurer deductible under TRIA, we shall not be liable for the payment of any portion of the amount of such losses that exceed $100 billion. In such case, your coverage for terrorism losses may be reduced on a pro-rata basis in accordance with procedures established by the Treasury, based on its estimates of aggregate industry losses and our estimate that we will exceed our insurer deductible. In accordance with the Treasury's procedures, amounts paid for losses may be subject to further adjustments based on differences between actual losses and estimates.

D. All other terms and conditions remain the same.

OP ID: CM

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 09/11/12

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Low & Johnson, Inc.
PMB 618
10645 N. Tatum Blvd, Suite 200
Phoenix, AZ 85028-3053
Jamie S. Low, CPCU, CIC
480-948-7838
480-948-1707

CONTACT NAME: Cheri Preas
PHONE (A/C, No, Ext): 623-580-7673
FAX (A/C, No): 480-948-1707
E-MAIL ADDRESS: cpreas@lowjohnson.com
PRODUCER CUSTOMER ID #: ARIZO-9

INSURED
Arizona Town Hall
Attn: Tara Jackson
1 E. Camelback Rd., #530
Phoenix, AZ 85012

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Hartford Casualty Ins Co	
INSURER B :	
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL LIABILITY X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY PRO-JECT LOC	X	X	59SBAVN7227	06/01/12	06/01/13	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 300,000 $ 10,000 $ 1,000,000 $ 2,000,000 $ 2,000,000 $
A	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS X HIRED AUTOS X NON-OWNED AUTOS			59SBAVN7227	06/01/12	06/01/13	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DEDUCTIBLE RETENTION $						EACH OCCURRENCE AGGREGATE	$ $ $ $
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A					WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ $ $

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

RFP #13RP005. City of Scottsdale, its agents, representatives, officers, directors, officials and employees are shown as an additional insured on a primary non-contributory basis as respects to work performed by the named insured. Waiver of subrogation applies.

CERTIFICATE HOLDER

CITYOSC

City of Scottsdale
Purchasing Service Dept.
James Flanagan
9191 East San Salvador Drive
Scottsdale,, AZ 85258

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Form **W-9**
(Rev. October 2007)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)
Arizona Town Hall

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☑ Corporation ☐ Partnership
☐ Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶
☑ Other (see instructions) ▶ 501 (c) (3)

☐ Exempt payee

Address (number, street, and apt. or suite no.)
One East Camelback Rd., Suite 530

Requester's name and address (optional)

City, state, and ZIP code
Phoenix, AZ 85012

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number
: :

or

Employer identification number
86 : 0177876

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here Signature of U.S. person ▶ Date ▶ 7-27-2011

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,