



## **AGENDA**

### **BOARD OF DIRECTORS WORK SESSION**

Wednesday, May 20, 2026 2:00pm  
WC Room 2 / Zoom

**Directors:** Candy English (President), Steve Reynolds (Vice President), Kristy McCue (Secretary), Lanny Smith (Treasurer), Jodie Walker (Assistant Secretary), Nellie Johnson (Assistant Treasurer), Dave Barker, Bart Hillyer, Chris McCrummen, Barry Stock, Scott Somers (non-voting)

#### **AGENDA TOPIC**

- 2:00 **1. Call to Order / Roll Call**
- 2:05 **2. Amend / Approve Agenda**
- 2:10 **3. Strategic Plan: Review Survey Questions**
- 2:40 **4. Discussion on GVR/GVR Foundation MOU Joint Responsibilities**
- 3:00 **5. Member Comments**
- 3:10 **6. Adjournment**

*GVR encourages the Board and members to voice concerns and comments in a professional, business-like, and respectful manner.*



Green Valley Recreation, Inc.  
**Board of Directors Work Session**  
**Strategic Plan Survey Questions**

**Prepared By:** Nanci Moyo, Board Admin.

**Meeting Date:** May 20, 2026

**Presented By:** Scott Somers, CEO

**Consent Agenda:** No

<p><b>Originating Committee / Department:</b> Administration</p>
<p><b>Action Requested:</b> Review and provide general feedback on the proposed survey questions for the 2026 Strategic Plan and member satisfaction.</p>
<p><b>Strategic Plan:</b> GOAL 5: Provide sound, effective governance and leadership for the corporation</p>
<p><b>Background Justification:</b> Zelos, LLC, are professional strategic planning consultants contracted by GVR to aid the Board of Directors in developing a new five-year strategic plan and performance management plan. Part of the scope is an environmental scan component, a random statistically significant survey of GVR members and an online member survey for those members who wish to participate but were not randomly selected.</p> <p>Zelos and GVR staff have worked together to provide the Board the proposed survey questions that will focus on two sections: the Strategic Plan and membership satisfaction. The Board is asked to give general feedback on the survey questions during the Work Session and then approve the survey questions at the Special Meeting following this Work Session.</p>
<p><b>Fiscal Impact:</b> The budget for the survey is included in the Zelos contract.</p>
<p><b>Attachments:</b> 1) Survey Questions</p>



## Green Valley Recreation Strategic Planning Survey for Members, 2026

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Draft (6) as of May 15, 2026—ready for GVR Board packet.

This survey is designed to gather input from GVR members to support two purposes:

1. **Member survey + trend analysis:** To assess member perspectives, track trends over time, and evaluate progress related to the current 2022–2026 GVR Strategic Plan. Questions were retained from prior member surveys to allow for comparison over time and to measure performance on current goals and initiatives.
2. **Strategic planning:** To inform development of the 2027-2030 GVR Strategic Plan by identifying member priorities, emerging trends, future needs, and perspectives regarding facilities, services, technology, and long-term sustainability.

### Survey process and dates

#### Survey process

1. GVR will provide the current GVR members list (including names and emails). The member list will exclude duplicate listings as well as mobile home park members, retirement home members, LLCs, and Estate ofs.
2. Zelos will identify the sample by randomly selecting GVR members from the full GVR member list and send the survey from Qualtrics (survey software) with an individual link. If the sample includes one or more members with the same member email address, Zelos will email only to the member with the lowest Member ID.
3. We will determine a target sample size sufficient to achieve a 95% confidence level and a margin of error of approximately  $\pm 4\text{-}5\%$ , based on the total population size. Anticipated response rates of between 10-14% will be considered when determining the number of individuals invited to participate.<sup>1</sup>
4. Zelos will provide GVR with a separate survey URL for non-sampled members so that GVR can provide an option for non-sample members to participate.

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<sup>1</sup> As an example, let's say our total population is 5,000; to reach the target confidence level and margin of error, we need at least 357 responses. To get 357 responses with a 10% response rate, we need to invite 3,570 people.



5. Neither Zelos nor GVR will mail or offer paper versions of the survey. If members need help completing the survey electronically, GVR staff will support them at the office.

### Key survey dates

- **May 20<sup>th</sup>**: Board reviews and approves the survey (in meeting)
- **June 14<sup>th</sup>**: Zelos provides the URL to GVR to share with members who are not included in the sample
- **June 15<sup>th</sup>**: Zelos launches the survey via email to the sampled members
- **June 18<sup>th</sup> & 23<sup>rd</sup>**: Zelos sends reminders from the system to the sample
- **June 26<sup>th</sup>**: Zelos closes survey to begin analysis



## Strategic planning survey for members

NOTE to reviewers: All questions are from prior surveys except the ones that begin with **[NEW]**, highlighted in green.

### Introduction

Green Valley Recreation has partnered with Zelos, LLC to conduct this survey to help inform GVR's strategic plan and guide future planning for programs, services, and facilities. Zelos, LLC facilitated GVR's 2021 Strategic Planning project and conducted the 2022 Member Survey.

We anticipate that this survey will take you approximately **XX** minutes. Your responses will only be reported in aggregate; individual responses will not be attributed to any member.

For technical questions regarding the survey, please contact Elisa Torres at Zelos (elisa.torres@zelosllc.com). For any additional questions, please contact the GVR hotline by emailing [hotline@gvrec.org](mailto:hotline@gvrec.org).

We appreciate your participation and thoughtful feedback!

### Section 1. GVR membership

Note: All survey items in this section are from previous surveys. Do not edit if time trends are important.

1. Enter your GVR member ID. Please enter it carefully; we will validate it and will not be able to use your responses if we cannot validate. Note: Your individual responses will not be associated with your GVR member number. [text response; numeric validation in Qualtrics]
2. How long have you been a GVR member? [select one]
  - Less than 1 year
  - 1-5 years
  - 6-10 years
  - 11-15 years
  - 16-20 years
  - More than 20 years
3. Which of the following best describes your primary role with GVR? [select one]

**Zelos**

1800 Diagonal Road, Suite 600 | Alexandria, Virginia 22314 | 703-828-7831 | [www.zelosllc.com](http://www.zelosllc.com)



- Member
  - Club member
  - Board/Committee member
4. Which best describes your residency in Green Valley? [select one]
- I live in Green Valley year-round
  - I live in Green Valley part of the year
5. Do you own more than one GVR property [select one]
- Yes
  - No
6. **[NEW]** How did you first learn about GVR? (Please select the primary source.)  
[select one]
- Friends or family
  - Current GVR members
  - Real estate agent or broker
  - Builder, developer, or property listing
  - Online search or AI tools
  - GVR website
  - Social media
  - Newspaper, magazine, or print advertising
  - Travel, retirement, or relocation publication
  - Visited or toured GVR facilities
  - Other (please specify): [text response]
  - I do not remember



## Section 2. GVR mission and vision

**GVR's current mission is:** To provide excellent facilities and services that create opportunities for recreation, social activities, and leisure education to enhance the quality of our members' lives.

7. **[NEW]** A mission is the fundamental reason an organization exists. How well does GVR's current mission communicate that purpose? [select one]
- Not at all well
  - Slightly well
  - Moderately well
  - Very well
  - Extremely well
8. **[NEW; only ask if the mission statement response is "not at all well" or "slightly well"]** You indicated that the current mission is not describing the fundamental reason that GVR exists. What would you change? [text response]

**GVR's current vision is:** To be a friendly, vibrant community of choice for adults desiring lifelong opportunities for physical, mental, and social engagement.

9. **[NEW]** How well does GVR's current vision reflect the future desired by the community? [select one]
- Not at all well
  - Slightly well
  - Moderately well
  - Very well
  - Extremely well
10. **[NEW; only ask if the vision statement is "not at all well" or "slightly well"]** You indicated that the current vision does not reflect the future desired by the GVR community. What would you change? [text response]



### Section 3. Member participation and experience

Note: All survey items in this section are from previous surveys unless otherwise noted. Do not edit if time trends are important.

#### 3.1. Programs and activities

11. In the past 3 years, have you participated in any activity at GVR (used the facilities or pools, attended a class or an event, or participated in a club)? [select one]

- Yes
- No [If No is selected, skip the next question]

12. Thinking about the most recent times you've participated in the following activities, rate your **overall experience** with each activity. [matrix; 1 to 5 rating scale, Very poor to Excellent with 'I don't remember' and 'I don't know' options]

- a. Aquatics
- b. Arts & crafts classes
- c. Clubs: Arts & crafts
- d. Clubs: Cards & games
- e. Clubs: Dance
- f. Clubs: Social
- g. Clubs: Special interest
- h. Clubs: Sports
- i. Dances
- j. Fitness center
- k. GVR events and entertainment
- l. Lectures
- m. Movies
- n. Other classes
- o. Personal training
- p. Racket sports
- q. Sports & fitness classes
- r. Trips & tours

13. Overall, how satisfied are you with the **services and programs** offered at GVR? [select one]

- Extremely dissatisfied
- Somewhat dissatisfied



- Neither dissatisfied nor satisfied
- Somewhat satisfied
- Extremely satisfied
- I don't know.

14. [NEW] Have you contributed to the GVR Member Assistance Program (MAP) in the past five (5) years? [select one]

- Yes [If Yes is selected, skip Q15]
- No [If No is selected, ask Q15]

15. [NEW] What is the primary reason you have not contributed to the GVR Member Assistance Program (MAP)? Please select the **primary** reason: [select one]

- I was not aware of the program.
- I do not have the financial ability to contribute.
- I support other charitable or philanthropic causes.
- I am not familiar enough with how the program works.
- I do not believe this type of assistance should be funded by members.
- I have not been asked or reminded to contribute.
- Other (please specify): [text response]
- I prefer not to answer.

### 3.2. GVR organization effectiveness

16. Please indicate how effective you think GVR is at doing each of the following items. [matrix; 1 to 5 effectiveness scale, Not effective to Extremely effective with 'I don't know' option; replicate randomization selections from 2022 survey]

- a. Provides opportunities for members to maintain and improve their physical health
- b. Provides recreational opportunities
- c. Provides opportunities for members to make social connections
- d. Provides activities that address members' emotional well-being
- e. Provides activities that stimulate members' minds
- f. Creates an enjoyable environment in which to live
- g. Responds to member needs
- h. Maintains open lines of communication with members
- i. Makes timely and important decisions
- j. Demonstrates courteous, professional, and businesslike behavior



- k. Provides recreational/social opportunities to members who may have difficulty with mobility, health, or other issues that present challenges

17. Please rate your agreement with each of the following statements. [matrix; 1 to 5 agreement scale, Strongly disagree to Strongly agree with 'I don't know' option; replicate randomization selections from 2022 survey]

- a. GVR makes it possible for me to participate in a variety of social opportunities.
- b. Communication and information from GVR staff are trustworthy.
- c. I can attend Board and Board committee meetings in the way that I want to attend.

18. Overall, how satisfied are you with your experience(s) with **GVR staff**? [select one]

- Extremely dissatisfied
- Somewhat dissatisfied
- Neither dissatisfied nor satisfied
- Somewhat satisfied
- Extremely satisfied
- I don't know.

### 3.3. GVR facilities

19. Please rate your agreement with each of the following statements. [matrix; 1 to 5 agreement scale, Strongly disagree to Strongly agree with 'I don't know' option; replicate randomization selections from 2022 survey]

- a. GVR provides excellent facilities.
- b. GVR provides clean facilities.
- c. GVR spaces are well-equipped for the activities being offered in them.

### 3.4. GVR Board

20. Please rate your confidence in the GVR Board's ability to... [matrix; 1 to 5 confidence scale, Not confident at all to Extremely confident; replicate randomization selections from 2022 survey]

- a. Advance the best interests of GVR and the general membership.
- b. Make important decisions in a timely manner.
- c. Plan ahead by identifying changing senior recreation trends and anticipating challenges.



- d. Work collaboratively in a professional and productive manner.
- e. Communication and information from the GVR Board is trustworthy.

### 3.5. GVR outcomes

21. Please rate your agreement with the following statements: [matrix; 1 to 5 agreement scale, Strongly disagree to Strongly agree with 'I don't know' option; replicate randomization selections from 2022 survey]

- a. GVR recreational opportunities enhance my quality of life.
- b. GVR social opportunities enhance my quality of life.
- c. GVR leisure education opportunities enhance my quality of life.

### 3.6. GVR value

22. "Value for money" could be viewed in terms of cost, quality, or a combination of both. Which one of the following best describes how you see "value for money"? [select one]

- Cost is the most significant factor
- Cost is more significant than quality
- Cost and quality are equally significant
- Quality is more significant than cost
- Quality is the most significant factor

23. How would you rate the value for money of GVR? [select one]

- Very poor
- Poor
- Average
- Good
- Excellent

## Section 4. Future needs, demands, and trends

Note: All survey items in this section are from previous surveys unless otherwise noted. Do not edit if time trends are important.

24. Please indicate your agreement with each of the following endings to this sentence: **I would like to see more...** [matrix; 1 to 5 agreement scale, Strongly disagree to Strongly agree with 'I don't know' option; replicate randomization selections from 2022 survey]



- a. Communication from GVR
  - b. Facilities
  - c. Greater accessibility for people with limited mobility
  - d. GVR Events
  - e. Leisure education opportunities
  - f. Meeting rooms
  - g. Options for communicating with GVR
  - h. Options for low-income members
  - i. Partnerships that will allow for expanded services
  - j. Recreation opportunities
  - k. Social opportunities
  - l. Volunteer opportunities for members
25. **[UPDATED BASED ON CURRENT STATE]** Below are several trends or changes that may affect GVR over the next several years. What 2 or 3 trends or changes concern you most in terms of their impact on GVR’s facilities, services and its long-term sustainability? (Select up to 3) [multi-select]
- Members are aging in place and may need different services or facilities.
  - More members are working remotely or spending more time at home.
  - Demand for social, wellness, and health-related services is increasing.
  - Rising costs due to inflation and broader economic conditions.
  - Water availability and water quality concerns are increasing.
  - Increasing temperatures and extreme weather conditions.
  - Aging facilities and the cost of repairs or replacement.
  - Changes in the affordability of living in the community.
  - Changes in the age mix and demographics of members.
  - Other (please specify): [text response]
  - None of the above
26. **[NEW]** Thinking about what might be changing in the environment over the next 2-3 years, what changes would you like to see GVR make? [Text response]
27. **[NEW]** When considering GVR’s future investments, which of the following should be the highest priorities? (Select up to 3) [multi-select]
- Maintaining existing facilities
  - Modernizing aging facilities
  - Expanding or enhancing programs and services
  - Improving accessibility of facilities and programs



- Enhancing technology and online services
  - Conserving water and energy resources
  - Limiting increases in member dues as much as possible
28. [NEW] Please rank the priorities you selected in the prior question with 1 being the highest priority. [rank based on prior choice options selected]
29. [NEW] Which statement best reflects your perspective regarding GVR dues and facilities? [select one]
- I prefer keeping dues as low as possible, even if that means some facilities are updated more slowly.
  - I support moderate dues increases if needed to maintain current facilities and services.
  - I support dues increases to improve and modernize facilities over time.
  - I am unsure or need more information.
30. [NEW] Which technology or online service improvements would be most valuable to you? (Select up to 3.) [multi-select]
- Easier online registration for classes and activities
  - Improved website navigation and usability
  - Better access to information about facilities, programs, and events
  - Online reservations or booking options
  - Improved digital communication and updates from GVR
  - Mobile-friendly online services
  - Virtual or hybrid classes and programs
  - Online payment options
  - Expanded technical support or assistance for members
  - None of the above
  - Other (please specify): [text response]
31. [NEW] How important is it to you for GVR to maintain all 13 pools it currently operates? [select one]
- Not at all important
  - Slightly important
  - Moderately important
  - Very important
  - Extremely important



- I do not use these amenities.

32. [NEW] Please rate your agreement with each of the following statements. [matrix; 1 to 5 agreement scale, Strongly disagree to Strongly agree with 'I don't know' option]

- I believe GVR should close some of its pools to control member dues.
- I support dues increases to maintain the current number of pools.
- I think GVR should have more pools.

### Section 5. Strengths and opportunities for the future

33. [NEW] What would you say GVR does extremely well? Please be specific. [text response]

34. [NEW] What would you say are GVR's opportunities for improvement? Please be specific. [text response]

### Closing message

Thank you for providing your input! It will help us understand what our strengths, weaknesses, opportunities, and challenges are and will help guide our future planning. If you have additional input to share with us, send an email to [hotline@gvrec.org](mailto:hotline@gvrec.org). Staff will be happy to receive and review any additional input you have.



Green Valley Recreation, Inc.

## Board of Directors Work Session

### GVR/GVR Foundation MOU Joint Responsibilities

**Prepared By:** Nanci Moyo, Board Admin.

**Meeting Date:** May 20, 2026

**Presented By:** Scott Somers, CEO

**Consent Agenda:** No

**Originating Committee / Department:**

Ad Hoc Committee GVR/GVR Foundation Capital Campaign

**Action Requested:**

Discuss joint responsibilities from the Memorandum of Understanding (MOU) signed by the GVR Board and GVR Foundation Board. Approval of marketing materials and messaging will be brought to the Board at the Special Meeting following the Work Session.

**Strategic Plan:**

GOAL 5: Provide sound, effective governance and leadership for the corporation

**Background Justification:**

At the Regular Meeting of the Board on January 28, 2026, the Board approved the MOU between GVR and GVR Foundation.

The MOU states:

3. Roles and Responsibilities

A. Joint Responsibilities

Both Parties agree to:

1. Approve the overall Campaign strategy, marketing materials, and messaging.

B. Responsibilities of the Foundation

4. Coordinate community engagement, outreach, and public relations activities with GVR.

C. Responsibilities of GVR

3. Assist with community engagement, outreach, and public relations activities, specifically by and limited to eblasts, GVRNow, website announcements, and facilities for meetings and related events.

The Chair of the Ad Hoc Committee will present marketing materials and messaging to the Board for discussion at the Work Session.

**Fiscal Impact:**

None

**Attachments:**

- 1) GVR and GVR Foundation MOU
- 2) Key Information Sheet
- 3) Marketing Strategy
- 4) Frequently Asked Questions
- 5) Sample Letters

## **MEMORANDUM OF UNDERSTANDING**

**Between**

**GVR Foundation (Foundation) and Green Valley Recreation Inc. (GVR)**

### **1. Purpose**

This Memorandum of Understanding (“MOU”) outlines the responsibilities, commitments, and cooperative relationship between the GVR Foundation, herein referred to as “The Foundation”, and Green Valley Recreation Inc., herein referred to as “GVR” and “collectively “the Parties” for planning and implementing a joint \$1,000,000 capital fund-raising campaign (“the Campaign”) for the Member Assistance Program (MAP) Endowment

The Foundation is an Internal Revenue Code 501(c) (3) tax-exempt, nonprofit charitable organization established in 2015. It is distinct from GVR. The Foundation’s mission is “enhancing the quality of life for GVR members and the greater Green Valley community through connecting resources for those in need with those who care.” It focuses on charitable giving to enhance and support the community through programs, advocacy, and financial support that promote health and wellness for residents in the Green Valley, Arizona area.

GVR is an Internal Revenue Code 501(c) (4) civic organization whose purpose is to provide recreational, cultural, and educational programs for the enjoyment of GVR Members and their guests.

The parties involved agree to work together to raise funds that will support the MAP Endowment. This endowment is designed to ensure a sustainable funding source for the MAP program, which currently provides financial assistance to GVR members who need help paying their annual GVR dues.

### **3. Roles and Responsibilities**

#### **A. Joint Responsibilities**

Both Parties agree to:

1. Approve the overall Campaign strategy, marketing materials, and messaging.
2. Identify donor prospects from both organization’s networks.
3. Review campaign progress monthly or at other times agreed to by the Chairs of the Ad Hoc Committee.

4. **Ensure compliance with all legal and ethical fundraising standards.**
- 

## **B. Responsibilities of The Foundation**

1. **Serve as the fiscal agent for the Campaign, including:**
    - o processing donations
    - o issuing tax receipts
    - o maintaining financial records
  2. **Manage the Campaign database and donor tracking system. This does not include GVR providing member donors' private information to The Foundation.**
  3. **Provide funding to support the Campaign expenses, including but not limited to postage, printing, refinement of website, and other in-kind administrative support as budgeted by The Foundation for the campaign.**
  4. **Coordinate community engagement, outreach, and public relations activities with GVR.**
  5. **Hire and manage a fundraising consultant, if necessary, solely at The Foundation's expense.**
  6. **Be solely responsible for thanking donors.**
  7. **Participate in and support the solicitation of major donors**
- 

## **C. Responsibilities of GVR**

1. **Provide Campaign volunteer leadership through Board participation.**
2. **Assists in recruitment of volunteers from its membership to serve on the Campaign Steering Committee.**
3. **Assist with community engagement, outreach, and public relations activities, specifically by and limited to eblasts, GVRNow, website announcements, and facilities for meetings and related events.**
4. **Assist with the planning and providing space for donor events, if any.**
5. **Promote the Campaign across its membership and stakeholder groups through joint communications such as the GVR eBlast, and GVRNow, and public service announcements**

including video on Center monitors (monthly news bulletin) and email communications to members.

6. Revise the GVR website to promote the MAP program and the Endowment Campaign.
  7. Host regular Campaign Committee meetings.
  8. Support the solicitation of major donors.
- 

#### **D. Governance Structure**

1. Ad Hoc Committee will serve as the oversight committee
  2. Campaign Steering Subcommittee will consist of the members of each Party and other community representatives approved by the Ad Hoc Committee. The Committee will:
    - Set strategic direction
    - Approve campaign phases, timelines, and materials
    - Oversee progress toward the \$1,000,000 goal
    - Serve as ambassadors promoting the campaign
    - Lead solicitation efforts and help at special events, such as the GVR Showcase
    - Identify and write grant applications
    - Support donor cultivation
    - Create additional work groups that can assist in carrying out the Campaign responsibilities
- 

#### **E. Financial Management**

1. All Campaign donations will be directed to The Foundation as the designated fiscal agent.
  2. Campaign funds will be used exclusively for approved MAP Endowment purposes.
  3. A campaign budget will be reviewed and monitored by the Parties
  4. Both Parties will have access to monthly Campaign financial reports.
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## **F. Confidentiality**

Both Parties agree to maintain strict confidentiality regarding:

- Donor information, unless authorized by the donor
- Financial data of donors

Confidential information will not be shared outside the Parties without written consent.

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## **G. Public Communications**

All public announcements, printed materials, media releases, and marketing content related to the Campaign must be:

- Approved by the Ad Hoc Committee
  - Consistent with jointly established messaging
  - Released only through mutually agreed channels
- 

## **H. Duration and Termination**

This MOU becomes effective on the date signed and will remain active until:

- Completion of the campaign
- Disbursement of all funds
- Submission of a joint final report

Either Party may terminate the MOU with **30 days' written notice**, provided that:

- Both Parties agree on the wind-down process
- Financial obligations are fulfilled
- Donor commitments are honored

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**I. Amendments**

This MOU may be amended at any time by mutual written agreement of both Parties.

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**J. Signatures**

**GVR Foundation**

By: GVR Foundation President B. Tobiason  
Name: Brenty Tobiason  
Title: President  
Date: 3/12/26

**Green Valley Recreation Inc.**

By: GVR, PRESIDENT KATHI BACHELOR  
Name: Kathi Bachelor  
Title: President  
Date: 3/12/26



## OUR MISSION & VISION

**OUR MISSION:** Enhancing the quality of life for GVR members and the greater Green Valley community through connecting resources for those in need with those who care.

### HOW WE DO IT

- Annual Grants (\$25,000+) to the GVR Member Assistance Program (MAP), a GVR program that provides financial assistance to members who need help paying their GVR dues.
- Neighbors Helping GVR Neighbors Initiative through GVR Clubs
- Monthly and Bi-Monthly Bingo Games fundraising for the GVR Member Assistance Program and other local nonprofit charities.

**OUR VISION:** To be recognized community wide as the champion of enhancing the quality of life of GVR members and the greater Green Valley Community.

### PROVIDING NUMEROUS COMMUNITY GRANTS INCLUDING:

Friends in Deed  
Green Valley Cares  
Valley Assistance Services  
La Posada Community Services  
Community Food Bank of Southern Arizona  
Green Valley Fire Corps

## WHAT'S NEXT

### GVR FOUNDATION CAPITAL CAMPAIGN FOR MAP

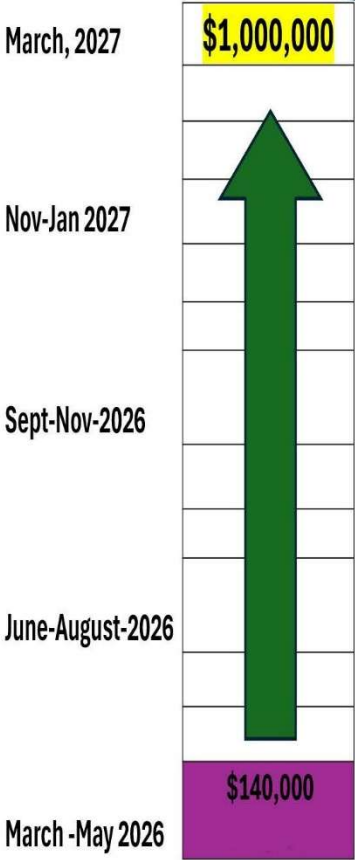
- Build the current MAP Endowment to \$1,000,000 to help support the GVR Member Assistance Program (MAP).
- The MAP Endowment would provide funding for up to \$50,000 per year to support GVR members who need help paying their annual dues.
- The GVR Member Assistance Program has been in existence since 1995 and has strict guidelines to determine eligibility. Since inception, it has helped over 1,500 members pay their dues.
- Your gift to the MAP Endowment protects the future of the GVR Member Assistance Program.

The **GVR Foundation** is an IRS 501(c) (3) tax-exempt, distinct legal entity apart from Green Valley Recreation, Inc., with a sole focus on charitable giving to enhance, enrich and support our community. This is possible only by generous tax-deductible financial support and gifts from individual and corporate donors, friends, and volunteers.

Visit our website: [www.gvrf.org](http://www.gvrf.org)

Contact us: [gvrfoundation.info@gvrf.org](mailto:gvrfoundation.info@gvrf.org)

# GVR FOUNDATION MAP ENDOWMENT CAMPAIGN



**GVR FOUNDATION CAPITAL CAMPAIGN FOR MAP**

- Build the current MAP Endowment to \$1,000,000 to help support the GVR Member Assistance Program (MAP).
- The MAP Endowment would provide funding for up to \$50,000 per year to support GVR members who need help paying their annual dues.
- The GVR Member Assistance Program has been in existence since 1995 and has strict guidelines to determine eligibility. Since inception, it has helped over 1,500 members pay their dues.
- Your gift to the MAP Endowment protects the future of the GVR Member Assistance Program.

**MAP ENDOWMENT CAMPAIGN PLAN -High level - March**

	Task	Lead	Quiet Phase March-May	Quiet Phase May-July	Public phase Aug- Oct	Nov-Jan	Jan-March
<b>1. Define /Campaign /Purpose/Goals</b>	Goal set at \$1.0m to fund MAP Endowment		Launch at March Showcase				Campaign ends at March
	Flyer Created with Goal target on back						
<b>2, Boards finalize MOU</b>	Both organizations signed MOU						
<b>3. Feasibility Analysis</b>							
<b>a. Donor analysis</b>	Create GVR donor pyramid from Cy2026 donors	Nellie J					
	get a listing of donors off of donor wall- prioritize	Donna	March 9th				
	Create Budget needs	Vicki?	March 9th				
<b>4. Create/Confirm Campaign Committee/Governance</b>							
<b>a. Ad Hoc Steering Committee</b>	Key steering committee set	Vicki					
<b>b. Campaign Committee of Ad Hoc group/GVR Volunteers?</b>	Identify priority needs and recruit select people:	Vicki	March 9th				
	a. GVR to recruit via eblast	Nellie	recruit in April				
<b>5. Create/implement Specific Campaign plan</b>		Campaign Committee					
<b>A. Communication materials</b>							
	a. key one page flyer wiith target progress	Donna					
	b. FAQ- Sheet : revise as questions are raised	Nellie	March 9th draft review				
	c. Revise Website - noting campaign	Donna	X				
	d. what are benefits to key donors and sponsors: decide		March /april				
	e. are we creating selective donor levels: in letter ie. Suggested donations: at the end of email letters/campaign						
	e. Banner for Endowment	Kathy					
	f. Video - put link in emails when completed				x		
	f. Radio launch		March 2nd				

	g. Newspapers-				x		
<b>B. Prioritize Key Individual Donors</b>			March 9th				
	a. Discuss and delegate list from Foundation list /	Vicki	March 9th		x	x	
	b. Approach key Foundation donors re: Qualified tax donors/				x	X	
<b>C, Letter to all other donors/</b>							
	a. Email GVR Households				x	x	
<b>D. Foundations and Business with Foundations</b>	a. identify list of foundations from websites/Regina's experience		March 9th				
	b. use FAQ as base document for information			X			
	c. set up timetable based on grant application submission dates:			x	x	x	
<b>E. Corporate Sponsors -no foundation</b>							
	a. get list from GV Chamber of Commerce/delegate	Steve					
	b. Prepare a general letter/email to businesses/ or delegate list for personal follow up			x	x		
<b>6.. Utilize Bingo Games as venue for awareness</b>	a. promote with flyer			x	x		
	b. discuss use % of proceeds for Endowment						
<b>7. Financial Mgmt./follow up wit</b>							
	a. monitor budget and expenses						
	1. send thank you notes: is this email or personalized	Foundation					
	2. Track Progress towards goals						
	4. Send tax donations letters						x
<b>8. Celebrate/Completion of Campaign</b>	Donor appreciation Party						

**GVR FOUNDATION MAP ENDOWMENT CAMPAIGN**  
**FREQUENTLY ASKED QUESTIONS Draft March 14**

**1. What is the GVR Foundation: (Foundation)**

- a. The Foundation is an Internal Revenue Code 501(c) (3) tax-exempt, nonprofit charitable organization established in 2015. It is distinct from GVR. The Foundation’s mission is “enhancing the quality of life for GVR members and the greater Green Valley community through connecting resources for those in need with those who care.” It focuses on charitable giving to enhance and support the community through programs, advocacy, and financial support that promote health and wellness for residents in the Green Valley, Arizona area. The Foundation's success is only possible with generous tax-deductible gifts, planned giving, corporate sponsorships, grants, and volunteerism.
- b. The Foundation has provided numerous community grants, including Friends in Deed, La Posada, Community Food Bank of Southern Arizona, Green Valley Fire Corps, and the GVR Member Assistance Program (MAP).
- c. More information on its organization can be found on its website: [www.gvrf.org](http://www.gvrf.org).

**2. What is its relationship to Green Valley Recreation (GVR)**

The GVR Foundation is a distinct, separate entity from GVR. GVR is an Internal Revenue Code 501(c) (4) civic organization whose purpose is to provide recreational, cultural, and educational programs for the enjoyment of GVR Members and their guests. As of January, 2026, approximately 23,800 individual members reside in 13,888 GVR deed-restricted residential properties, representing 80% of all Green Valley residents. When GVR deed-restricted homes are purchased, owners automatically become GVR members.

**3. Does GVR support the Foundation’s MAP Endowment Campaign?**

Yes. In January, 2026, the respective Boards of GVR, Inc. and GVR Foundation agreed to jointly undertake a capital campaign through the GVR Foundation for expansion of the MAP Endowment. They created an Ad Hoc Committee to oversee the MAP Endowment Campaign. Board members from both organizations serve on this Committee as well as the Steering Committee that manages the campaign.

**4. What is an Endowment and show an example of how it works?**

- a. An Endowment is money invested to generate ongoing income so an organization or program can be funded permanently. It provides long-term financial stability through a steady funding source, thus protecting the future of a particular program.
- b. The principal (\$1.0m) remains intact and only the earnings of the fund are used to make charitable distributions each year. For example, a \$1.0 million endowment fund (principal) could provide up to 5% in estimated earnings, or \$50,000 annually each year.

**5. What is the Capital Campaign MAP Endowment Goal?**

- a. The Capital Campaign target for the GVR Map Endowment is to increase it to \$1,000,000. This MAP Endowment was created in 2018. As of March 2026, there is \$140,000 in the Endowment Fund. The Foundation's vision for this project includes attainable goals. The Foundation will strive to achieve it to the best of its ability. Your gifts, large or small. will make the goal a reality.

**6. What is the Member Assistance Program (MAP)**

- a. MAP was created by GVR in 1995 to assist qualified GVR members in paying their GVR annual membership dues. In Cy 2026, the member's annual dues was \$545. Members may receive partial or full assistance in payment of these dues.

**7. What organization administers the MAP program and what are the eligibility requirements?**

- a. GVR administers the MAP program. A member must submit an application and meet the following criteria.
- b. To be eligible for MAP the following must apply
  - 1. Each person on title must have an income not greater than 200% of the Federal Poverty Guidelines. This Poverty Guideline for a single person was \$31,300 annually/\$2608 monthly.
  - 2. Applicant must be listed on the property deed/title.
  - 3. Applicant must be a GVR member for at least one full year.
  - 4. Applicant has self-paid GVR annual dues for at least one year.
  - 5. GVR members must be in good standing, no delinquent dues/fees at time of application.
  - 6. Applicant must own only one home and reside in the GVR home year-round.
  - 7. Previous MAP grant recipients must reapply each year. GVR cannot use any prior year's submission information.

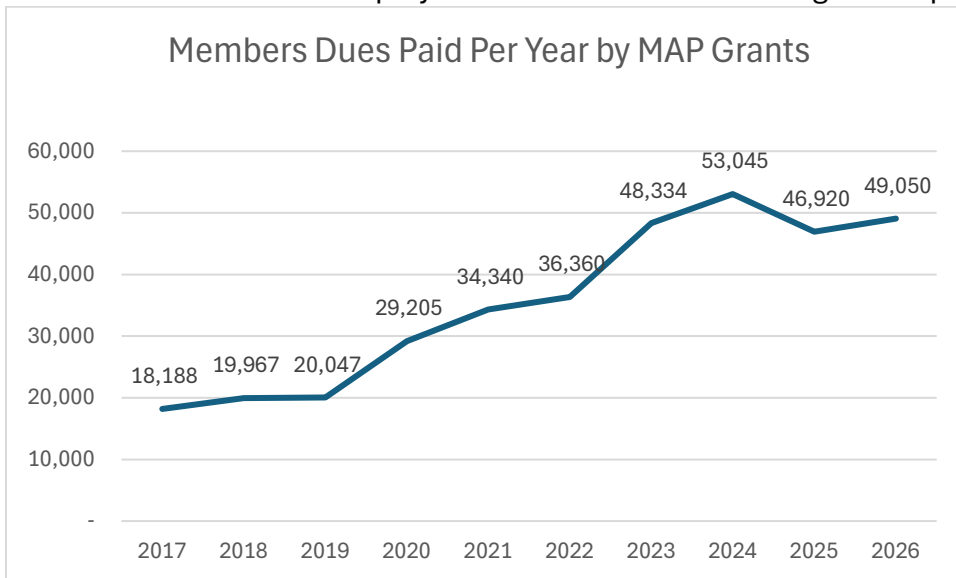
**8. Is there a need for this program in Green Valley**

- a. Yes. Green Valley is an unincorporated community of nearly 30,000 residents. It is an economically diverse community, with approximately 7% of its population living at or below the established poverty level. MAP helps these members who are experiencing financial hardship.

**9. In the last three years, MAP distributed about \$50,000 each year. How are these MAP distributions funded?**

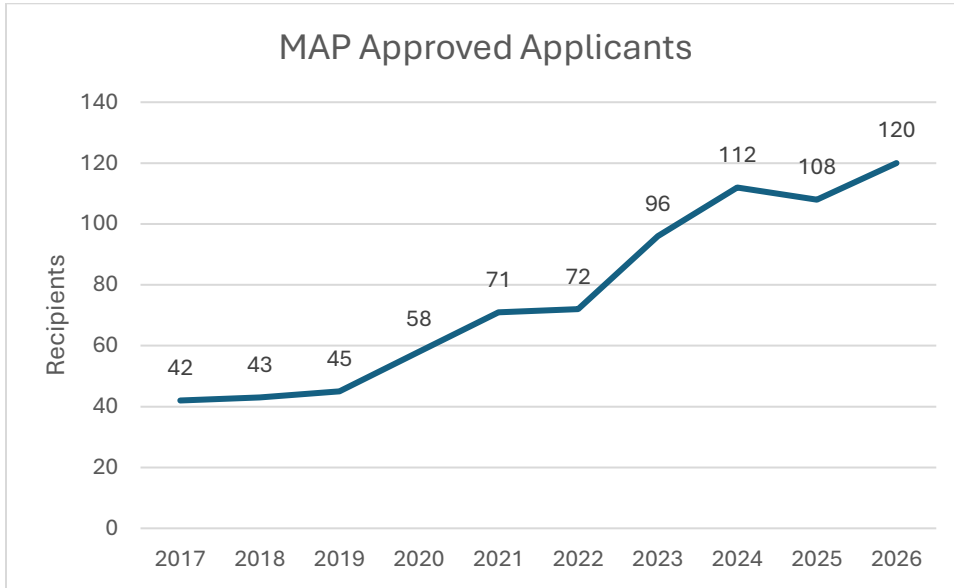
- a. MAP is funded on an annual basis in two ways. GVR requests grants from the GVR Foundation ranging in the amount of \$25-30K each year. These funds are raised annually through soliciting donations from donors and GVR Clubs. However, in the past two years, the Foundation has relied heavily on its BINGO Games, held once or twice a month, to generate this annual grant to GVR. This activity requires an extensive number of volunteers and may not be sustainable in the future. The Endowment would help build a more sustainable funding source.
- b. The remaining \$20,000 is funded directly by GVR through direct solicitation of its members, primarily at the time GVR sends out its billing statement to each member for its annual dues. In that statement, it requests donations to MAP.

- c. The Chart Below displays the amount of MAP funding for the past ten years.



**10. How many people are served under the MAP program?**

- a. MAP has been in existence since 1995 and has strict guidelines for its eligibility. Since its inception, it has helped over 1,500 members pay their dues.
- b. The chart below shows the number served over the past ten years.



**11. What are the different ways people can donate to the Endowment Campaign?**

- a. There are multiple ways to donate, including direct cash payments, donations from qualified retirement accounts, appreciated stocks and bonds, and gifts of tangible assets, such as autos, homes etc. See the foundation’s website ([www.gvrf.org](http://www.gvrf.org)) for greater detail on each category.

**12. Will donor recognition be part of the MAP Endowment Campaign?**

- a. Yes, Donor recognition is important to the GVR Foundation. Contributors to the GVR MAP Endowment will be recognized in GVR Foundation materials and onsite at the West Center unless anonymity is requested and several recognition plans are under consideration.



To Current GVR Board members (I'll send out directly as I have the addresses), emails to former GVR Board members, and Committee members need to be sent by GVR as they have the email addresses.

As you know, we have entered into a Memorandum of Understanding (MOU) with the GVR Foundation to launch a capital campaign to expand the MAP Endowment. We are reaching out to you as a current GVR Board member and respectfully request your support for this Endowment campaign.

Since 1995, the Member Assistance Program (MAP) has been there for GVR members who need help covering their dues. Over the years, thanks to generous supporters, the GVR Foundation has provided **\$205,814** to MAP of the total \$331,265 Map dues paid. The Foundation's support, in conjunction with GVR's funding of the remaining \$125,451 funding support from its member donations, has made a real difference in real people's lives. There have been over 1,500 MAP recipient payments since its inception.

As outlined in the MOU, GVR is supportive of the Foundation's campaign to establish a more sustainable funding source for this MAP program. We are projecting to grow the MAP Endowment from **\$140,000 to \$1,000,000**. Together, we now can turn that legacy into something lasting – a truly sustainable Member Assistance Program for the GVR community.

We have launched the campaign earlier this year, and are now approaching key donors to solicit support for this initiative. As a leader of GVR, you can be an important advocate of MAP. A **\$50,000** matching gift challenge has been pledged, which means your donation made before June 30, 2026 will be doubled. That is an opportunity to make your generosity go twice as far.

Please consider making a gift by June deadline of June 30<sup>th</sup>. You can donate online at: [www.gvrf.org](http://www.gvrf.org) or by mailing in the donation slip included in this email. Thank you for your consideration of this request.

Best regards,

GVR/GVR Foundation Ad Hoc Committee

Nellie Johnson  
 Steve Reynolds  
 Kathi Bachelor  
 Tony Zabicki  
 Donna Coon  
 Beverly Tobiason  
 Mike Hunter  
 Jim Counter



EMAIL OR LETTER – GET STATIONERY    SAMPLE LETTER

Dear [Business Owner/Manager Name],

I am writing to invite >>>>>>>>> to partner with the GVR Foundation in an important and lasting initiative -- our \$1 million Member Assistance Program (MAP) Endowment campaign. As a valued local business, you play an essential role in strengthening our community.

Green Valley is an unincorporated community of nearly 30,000 residents of which many are customers of yours. It is an economically diverse community, with approximately 7% of its population living at or below the established poverty level. MAP helps members experiencing financial hardship. Most of the MAP recipients are female single households over the age of 75. Some recipients experience financial difficulties due to the loss of Social Security income or reduced pension benefits upon the death of his/her spouse.

We welcome donations of any size and would be happy to discuss sponsorship levels or customized partnership opportunities. Your contribution is not just a gift—it's an investment in the future of our community by:

- Expanding services for those we serve
- Ensuring long-term financial stability for MAP services
- Creating lasting, positive change in our region

We would be honored to recognize your generosity in ways that align with your business goals, including public acknowledgment, promotional opportunities, and community visibility.

If you are interested in a sponsorship, I would appreciate the opportunity to speak with you further about how we can work together. Please feel free to contact me at [phone/email], or I will follow up with you next week. If you would rather not be a sponsor, we would welcome donations of any size. Donations can be made online at [www.gvrf.org](http://www.gvrf.org) or by sending in the below donor form to the GVR Foundation.

Thank you for your time, your leadership, and your commitment to our community.

Warm regards,  
[Your Name]

GVR Foundation/ GVR MAP Endowment Campaign Ad Hoc Committee

[gvrfoundation.info@gvrf.org](mailto:gvrfoundation.info@gvrf.org)

[Insert PPT on donations  
Insert Target PPT slide



DRAFT LETTER

Date:

Dear Pickleball Enthusiast,

Subject: MAP Endowment Campaign

I am writing to you because you previously gave to the GVR Foundation and /or the Pickleball Club, resulting in the construction of our 24 world-class Pickleball courts in Green Valley. I am again inviting you to partner on another GVR Foundation campaign, this time to build upon our existing Endowment for the Member Assistance Program (MAP).

Since 1995, MAP has provided financial help to qualified members with their dues. Since the start of the GVR Foundation, we have dispersed \$205,814 to the MAP program. We are working to increase the Endowment program to ensure this help continues, helping members stay active and socially connected in the Green Valley community. The MAP Endowment started in 2018 by the GVR Foundation and currently has approximately \$140,000. Once increased to \$1,000,000, annual Endowment dividends would ensure the MAP program is well sustainable in the future.

Please consider a generous donation to this important campaign. Donations can be made online at our website: <http://www.gvrf.org> or by sending in the payment slip below with your donation. Together, our legacy to the GVR community can be both Pickleball courts and a sustainable Member Assistance Program.

Best regards,

GVR/GVRF Foundation Ad Hoc Committee

Nellie Johnson  
Steve Reynolds  
Kathi Bachelor  
Tony Zabicki  
Donna Coon  
Beverly Tobiason  
Mike Hunter  
Jim Counter