



2018 IN REVIEW



NINA MASON PULLIAM
CHARITABLE TRUST

Building a Legacy of Community Grantmaking since 1998



2018 IN REVIEW

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NINA MASON PULLIAM
CHARITABLE TRUST

Building a Legacy of Community
Grantmaking since 1998

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WELCOME

Dear Friends,

2018 was a monumental year for the Nina Mason Pulliam Charitable Trust. We completed our 21st full year of grantmaking and surpassed \$300 million in giving. Several projects we invested in during previous years came to fruition. As we reflect on 2018 and these milestones, our most pressing question is: Are we helping change our communities?

We see change in measurable ways, thanks to strategic investments with nonprofit agencies on the front lines in our communities. The facts tell the story:

- Euthanasia rates for dogs and cats are down 75 percent in Indianapolis and 87 percent in Phoenix.
- Nina Scholars' graduation rates are twice that of college students facing similar challenges.
- 350 million gallons of water are restored or retained annually in Arizona's Verde River.
- Community, business, policy and conservation leaders are turning more attention than ever to the White River in Indiana.
- There are more voices for children in the foster care system.

Here are some impacts we celebrated in 2018.



From left: Trustees Lisa Shover Kackley and Kent E. Agness, Chair Carol Peden Schilling and President and CEO Gene D'Adamo

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Helping People in Need

Our largest focus by far is on helping people in need, primarily in the areas of gaining greater self-sufficiency, crisis intervention, foster care and education.



In 2018, we supported organizations, including Indianapolis Legal Aid Society, Kids' Voice of Indiana and Child Advocates, which deliver a greater voice for children caught in the legal system and help youth avoid entering the foster care system in the first place.

We also welcomed Class 18 of the Nina Mason Pulliam Legacy Scholars, the Trust's flagship program that helps individuals build a better future for themselves and their families through higher education. A recent study of Nina Scholars found their overall success rate was 76.4 percent, outpacing the graduation rates of traditional student peers.

In the Helping People in Need section below, see how the Trust's investments in the Bridging Success and THRIVE programs help former foster students obtain education so they can achieve greater self-sufficiency and how St. Joseph the Worker employs a two-generation approach to poverty, addressing the needs of both parents and children.

Protecting Animals and Nature

Environment

The Trust's second year of intensive investment in the Verde River and the White River yielded measurable and meaningful results. In the Environment section, read about:

- Partners for the White River activities that increase emphasis on waterway protection and water-use planning, including the Trust's investment in the White River Vision Plan and the Indiana Water Summit
- the Park Central Farm conservation easement that protects more than three miles of the Verde River, streamside forest and wildlife habitat
- how Trust-supported projects led by The Nature Conservancy in Arizona reduce consumption of, or restore to the Verde River, more than 350 million gallons of water each year.

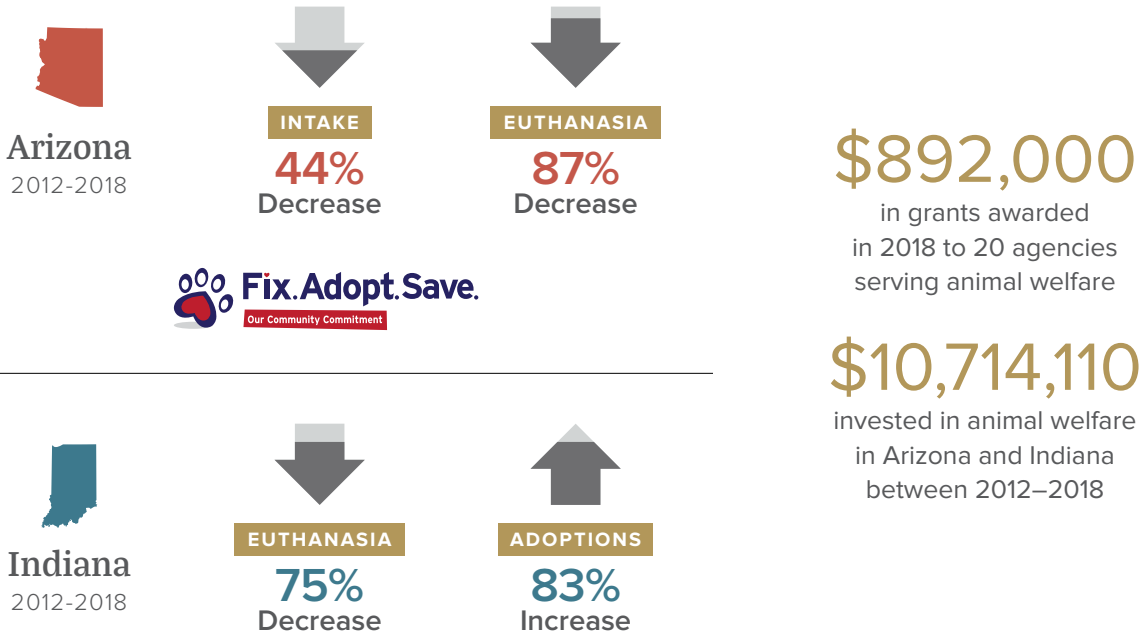


Beyond water issues, you can read on page 10 about the Trust's efforts to advance regional open space planning in Maricopa County.

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Animal Welfare

Nina Mason Pulliam loved animals of all kinds and gave generously to animal welfare causes in her lifetime. At the Trust, we honor her legacy with a focus on improving the welfare of companion animals in Nina’s home communities. In 2012, the Trust took the bold step to create and fund collaborative animal welfare initiatives in Indianapolis and Phoenix. Our efforts are focused on reducing the number of unwanted dogs and cats in those cities and surrounding communities by increasing spay and neuter surgeries, adoptions and public education on responsible pet ownership. From 2012 to 2018, euthanasia has fallen 87 percent in Maricopa County and 75 percent in Marion County. The Trust’s aim is to see these percentages continue to climb, further reducing pet overpopulation, so we continue to invest in organizations improving the plight of our communities’ companion animals.



In 2018, Indiana grantee FACE Low-Cost Animal Clinic unveiled its \$3 million medical facility expansion and the Trust welcomed Midwestern University as a new animal welfare partner in Arizona. Learn more in the Animal Welfare section.

Enriching Community Life

The Trust’s enriching community life giving area focuses on enhancing overall civic, cultural and economic vitality.

Aiming for long-term impact, in 2018, we granted \$1 million to the Phoenix Zoo for a new 1-acre African lion and hyena habitat to enhance this cherished community attraction and to aid in species preservation for the African lion. Three permanent museum gallery projects the Trust funded in previous years,

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including the Frozen Reign Ice Age exhibit at the Indiana State Museum, came to fruition in 2018; and we partnered with philanthropic peer and community organizations to support a community-wide initiative aimed at keeping youth safe online. Read about these projects in the Enriching Community Life section beginning page 15.

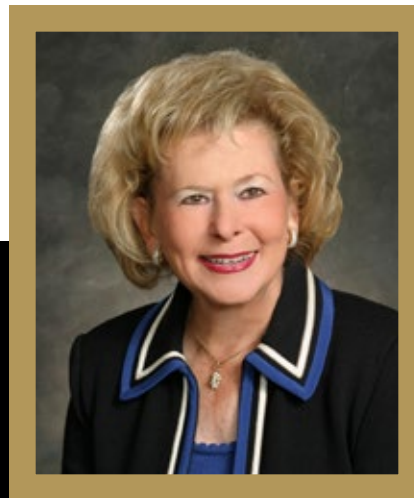
As we close out our 21st year of grantmaking, we feel immense gratitude for the many nonprofit organizations and community partners we worked with to effect lasting change in our communities. We look forward to the work we will accomplish together in the years ahead.

Carol Peden Schilling
Trustee Chair

Kent E. Agness
Trustee

Lisa Shover Kackley
Trustee

Gene D'Adamo
President and CEO



The Nina Mason Pulliam Charitable Trust 2018 Annual Report is dedicated to founding trustee

Nancy M. Russell

1930 – 2018

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HELPING PEOPLE IN NEED

Former foster youth thriving in college

Too many of our country’s youth end up in foster care, homeless or without connection to supportive family. Often their lives are chaotic, and the basics many take for granted – food, shelter, parental support – are missing or inconsistent. These experiences cause far-reaching and compromising social, physical and emotional effects and impact educational attainment. Nationally, less than 5 percent of these young adults earn a college degree.



With higher-education partners in Arizona and Indiana, the Trust created the Bridging Success and THRIVE programs to find these young people in our communities who have endured tremendous hardship and help them alter the course of their futures through education.

Drawing on the successful model of the Nina Scholars program, the Trust worked with Arizona State University and Maricopa County Community Colleges to create the Bridging Success program in 2014, and with Indiana

University-Purdue University Indianapolis to build the THRIVE program in 2016. These programs apply an in-depth understanding of foster youths’ unique needs and offer personalized coaching and supportive services to help these students stay in college and earn a degree.

Bridging Success and THRIVE instructional teams connect students to academic, social, psychological and financial resources, and provide environments and opportunities that help students grow beyond the limits of their upbringing.

At ASU and MCCC, the Bridging Success program is demonstrating great success, increasingly identifying and retaining former foster youth on campus. The program’s results have drawn the attention of other Arizona universities and colleges, which are working with Bridging Success program coordinators to build similar programs on their campuses. IUPUI reports that prior to THRIVE’s launch, students at the university who experienced foster care or were disconnected from parental supports had a one-year retention



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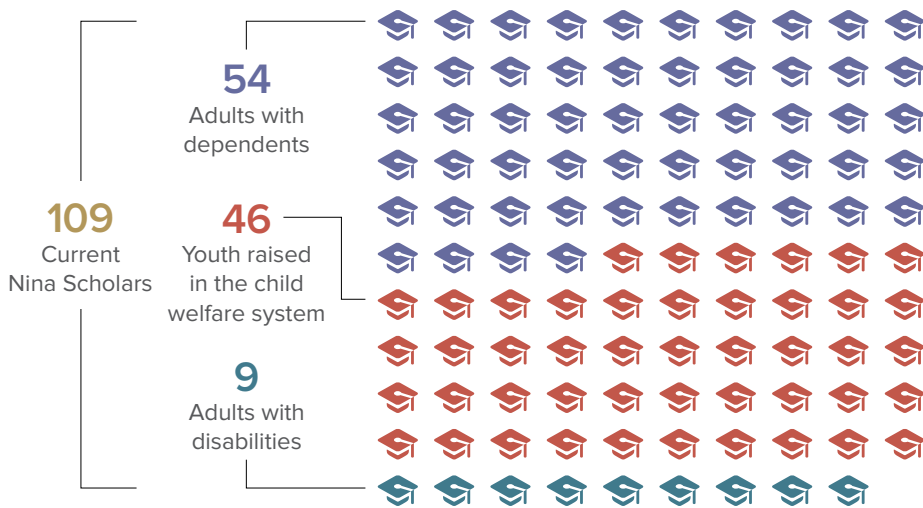
rate of 53 percent, compared with 74 percent for all IUPUI students. Just one year after the program began, the retention rate among THRIVE students climbed to 69 percent, approaching the campus average.

Through Bridging Success and THRIVE, students are part of understanding and supportive communities where they are developing and strengthening their personal skills and forging important new connections. They are growing, succeeding and charting a new course for their lives.

CUMULATIVE INVESTMENT: \$974,000

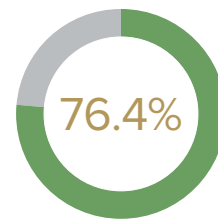
Nina Mason Pulliam Legacy Scholars Program

In 2001, the Trust established the Nina Mason Pulliam Legacy Scholars program to open doors of opportunity for men and women seeking college degrees. Nina Scholars are adults with dependents, people who have physical challenges and youth who have been in the foster care system.



323
Number of Nina Scholars graduates since 2001

\$27 million
Amount invested in the Nina Scholars program since 2001



Scholars graduating or continuing to progress to a degree, dramatically surpassing the rate of their peers

Our Partners



2018 INVESTMENT: \$1,150,622

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Rising to self-sufficiency

Homelessness continues to challenge Maricopa and Marion counties in Arizona and Indiana. As community and state leaders work to address the issue, the Trust supports social service organizations in both states that help bring homeless individuals, and those at risk of becoming homeless, to self-sufficiency.



St. Joseph the Worker’s Employment Heals Sunnyslope project in Phoenix is a workforce development model that removes obstacles to employment by providing the support and resources needed for clients to get and keep a job. In addition to pairing homeless and at-risk individuals with area employers, St. Joseph the Worker provides non-traditional support, such as bus passes, professional clothes, work boots, tools and certification fees – required items that can price a client out of accepting a job. Last year, nearly 4,000 Employment Heals clients earned an average starting pay of \$11.27 per hour and 42 percent secured jobs offering benefits; and by the six-month mark, at least 70 percent remained employed, putting them and their families on the path to sustained self-sufficiency.



Children’s Museum of Indianapolis’ Mid-North Promise program employs a two-generation approach to poverty, helping both parents and children through personalized educational planning for the entire family. To improve educational outcomes for families in six underserved neighborhoods surrounding the Museum, the Mid-North Promise program offers cradle-to-college educational programming for youth and post-secondary scholarship support for both youth and their parents. The Museum’s family learning navigator helps each family determine

the children’s and parents’ needs, from finding a high-quality preschool to assuring older children attend schools that work for them. It also addresses any educational interests and needs for parents to improve their earning potential. Over the past two years, the Museum has distributed \$55,000 in renewable scholarships to program participants.

CUMULATIVE INVESTMENT: **\$195,000**

Visit our website to view the full list of 2018 Helping People in Need grantees.

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ENVIRONMENT

Conserving the Verde River

At 595 acres, Park Central Farm is the largest privately owned farm along the banks of Arizona’s Verde River. In 2018, property owners Hauser and Hauser Farms entered into a voluntary conservation easement that will protect streamside forests and wildlife habitat, reduce water use on the farm and assures the land will never be subdivided or developed. This long-term conservation effort is the result of The Nature Conservancy’s sustained work on behalf of the Verde River, the Hauser family’s dedication to water conservation, and the Trust’s \$2.5 million investment, along with that of the Arizona Game and Fish Department, Natural Resources Conservation Service and the Conservancy. Park Central Farm will remain a working farm, with the Hauser family employing agricultural best practices to reduce river water consumption and diminish polluting run-off. This successful public-private partnership demonstrates there does not have to be a choice between conservation or sound economics – we can have both.



The Park Central Farm project is one of several Trust Verde River projects launched in 2018 that cumulatively are protecting and restoring more than a 3-mile corridor of the river and retaining or returning more than 350 million gallons of water to the river every year.

CUMULATIVE INVESTMENT: **\$4,223,500**

Unifying for open space planning

Maricopa County in Arizona is one of the fastest growing counties in the nation, and with growth often comes development that eliminates or permanently alters natural resources and systems. In January 2016,

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the Central Arizona Conservation Alliance, a project of the Desert Botanical Garden, convened a two-year strategic planning process, involving more than 30 participating organizations and hundreds of meetings, to examine how to align economic growth, natural resources and cultural heritage conservation values.

The result is the Regional Open Space Strategy for Maricopa County, which CAZCA released in 2018. The ROSS is a road map that lays out first steps toward unified, cohesive, regional open space conservation, with strategies that include the social, cultural and environmental values of communities. When fully implemented, the ROSS will deliver an open space network that enhances the unique character of the desert region and enables Maricopa County to realize the full benefits of open space for people, the environment and the economy.



CUMULATIVE INVESTMENT: **\$1,085,000**

Advancing White River restoration and protection

Indiana’s White River and its watershed provide drinking water to 2 million people and habitat to several thousand plant and animal species. Interest in the waterway, which winds through the center of Indiana and urban Indianapolis, is on the rise; and the Trust’s investment in the White River is driving increased emphasis on waterway protection and water-use planning. In 2018, the Trust supported the first statewide Indiana Water Summit, which convened national water experts, public and business leaders, community groups and researchers to lay the groundwork for future statewide and regional water planning. The Trust is participating in the White River Vision Plan, a joint effort among Hamilton and Marion counties and numerous



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municipalities; economic development, tourism, conservation and community organizations and other stakeholders, to develop a community-driven plan to enhance 58 miles of the river. Last year also marked the Partners for the White River's first full year implementing \$4.9 million in collaborative projects the Trust funded in 2017 to protect and restore the river and surrounding habitat. The numerous Indianapolis-area nonprofit organizations comprising the Partners are performing water quality research and monitoring, helping reduce pollution, improving wildlife habitat, and increasing Hoosiers' access and connection to the waterway. Hoosiers are embracing the White River – its challenges and its opportunities – with renewed energy, making this an opportune time to engage even greater numbers in efforts to restore and protect this critical, life-giving resource.



CUMULATIVE INVESTMENT: \$6,580,900

Visit our website to view the full list of 2018 Protecting Nature grantees.

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ANIMAL WELFARE

Mobilizing veterinary care

The Trust continuously seeks to establish new partnerships with animal welfare organizations in Arizona and Indiana to expand the care and services for companion animals in our communities. In 2018, the Trust funded new grantee Midwestern University’s Shelter Medicine program to purchase a mobile surgical unit and support spay/neuter and wellness services. The climate-controlled mobile surgery unit allows medical staff to safely provide medical care and conduct surgery during the hot summer months and take veterinary services to underserved neighborhoods in the greater Phoenix metropolitan area and nearby Salt River Pima-Maricopa Indian Community. The mobile unit will result in an additional 800 surgeries and 1,200 medical cases each year; and the spay/neuter and wellness services funding allows Midwestern University staff and students to conduct more than 1,100 low-cost surgeries over six months.



2018 INVESTMENT: \$125,000

Increasing care for at-risk animals

The Trust awarded grants ranging from \$10,000 to \$25,000 to 13 Indianapolis-area animal welfare organizations in 2018 to support the groups’ efforts in caring for Indianapolis’ homeless pets and to continue to help reduce euthanasia rates in Marion County. These dedicated grantee organizations remove animals from municipal and county shelters and care for at-risk cats and dogs until they can help them find a permanent home.



2018 INVESTMENT: \$125,000

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Indiana hosts first statewide animal welfare conference

Representatives from 315 animal welfare organizations gathered in Indianapolis for the first statewide Indiana Animal Welfare Conference, focused on the plight of Indiana's companion animals. Hosted by Spay-Neuter Services of Indiana, the event provided an opportunity for animal welfare professionals to learn from one another, network and strategize about how to save more companion animal lives.



2018 INVESTMENT: **\$10,000**



Doubling clinic space, increasing impact

Spay/neuter surgeries are the most effective means of reducing pet overpopulation, which is why the Trust invests heavily in such surgeries in Indiana and Arizona. In 2015, the Trust contributed \$500,000 to double the size of FACE Low-Cost Animal Clinic in Indianapolis, which opened the doors of its renovated space in 2018. In its new facility, FACE staff will be able to conduct up to 17,000 spay/neuter surgeries and perform at least 22,000 dog and cat vaccinations annually.

CUMULATIVE INVESTMENT: **\$1,810,300**

Visit our website to view the full list of 2018 Protecting Animals grantees.

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ENRICHING COMMUNITY LIFE

Permanent galleries expand Arizona and Indiana cultural offerings

The Trust’s investments in enriching community life primarily focus on institutions and organizations that give a city its soul – libraries, zoos and museums. Three permanent galleries the Trust helped fund in prior years opened at museums in Indiana and Arizona in 2018.

Frozen Reign at the Indiana State Museum explores the Ice Age through compelling interactive experiences, complete with chilled-air ice tunnels, glacial sound effects and ancient animals in realistic environments. The exhibition demonstrates environmental change over time and its relevance for Indiana’s ecosystems today.



The Museum of Northern Arizona unveiled its revitalized Native Peoples of the Colorado Plateau exhibition. Museum directors partnered with more than 40 tribal consultants from several American Indian tribes to contribute to the gallery’s themes, objects and wording that describe the complex histories of the native people who have inhabited the Colorado Plateau for thousands of years.



Children clamber through prickly pear cactus pads, slither through an oversized rattlesnake and explore the secrets of the Packrat Playhouse: Hidden in the Midden installment at the Arizona-Sonora Desert Museum. Packrats are nature’s archivists. Their large, messy nests, or middens, leave clues about the local environment that existed thousands of years ago.

CUMULATIVE INVESTMENT: **\$1.6 MILLION**

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Investing in species preservation

Nina Mason Pulliam loved the Phoenix Zoo and was among its earliest benefactors. She generously invested in the Zoo during her lifetime, serving an instrumental role in saving the African oryx from extinction by leading and funding preservation efforts. Because of Mrs. Pulliam’s great affection for the Phoenix Zoo, the Trust continues to invest in its species preservation efforts, including funding in 2013 for the Sumatran tiger habitat. In 2018, the Trust provided \$1 million to aid the Zoo’s conservation efforts for the endangered African lion. The Trust’s investment supports development of a 1-acre habitat for the lion and the spotted hyena. The Phoenix Zoo is creating the new habitat as part of its participation with the African Lion Species Survival Plan Program through the Association of Zoos & Aquariums, an international breeding program.

CUMULATIVE INVESTMENT: **\$3,134,000**

**Collective community impact:
keeping youth safe online**

The Trust often partners with peer philanthropic foundations and community organizations to achieve greater impact. In 2018, the Trust joined with Arizona Community Foundation and the Phoenix IDA to bring Common Sense Media to Arizona to increase the safety of our community’s children in the online environment. According to Common Sense research, teens spend almost nine hours per day, outside of schoolwork, on some form of media; and 49 percent of fourth- to eighth-grade students are online after 11 p.m. on school nights. Issues surface for young people in schools and at home, including privacy violations, hate speech, online harassment,



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digital addiction and anxiety, and depression attributable to social media use. Common Sense Media provides parents, educators and children with resources and education to help young people maximize the positive effects of digital media and minimize the potential downsides.

2018 INVESTMENT: **\$267,000**

Visit our website to view the full list of 2018 Enriching Community Life grantees.

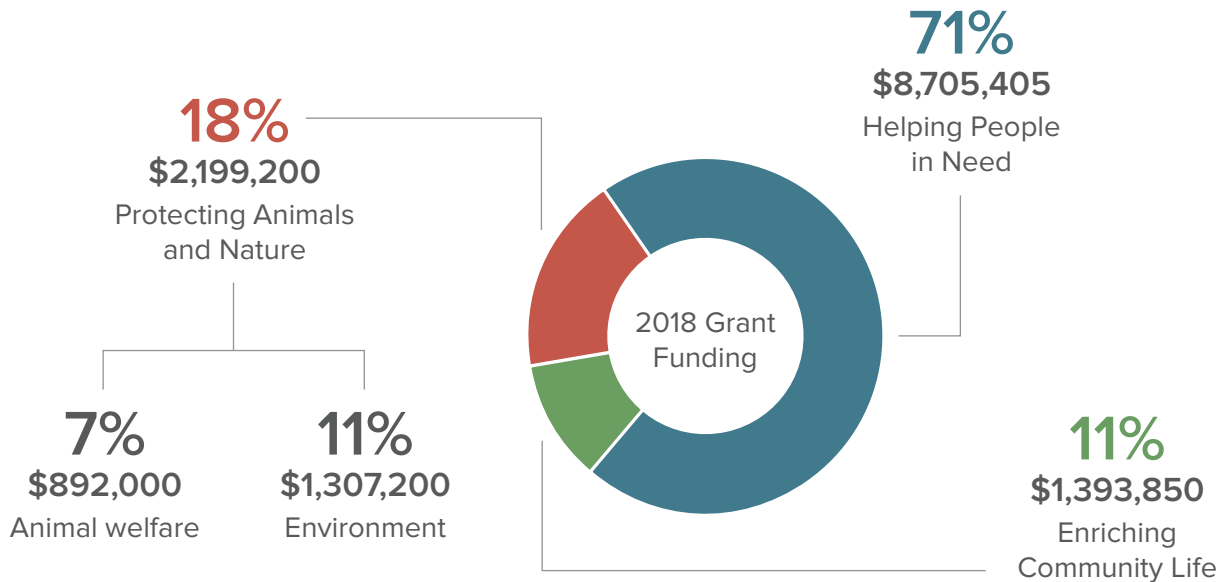
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FINANCIAL HIGHLIGHTS

Trust surpasses \$300 million giving milestone in 2018

Since its inception, the Trust has distributed nearly \$305 million in grants and scholarships to 989 nonprofit organizations in Arizona and Indiana, making an impact through our giving areas of helping people in need, protecting animals and nature, and enriching community life – the philanthropic interests and causes Mrs. Pulliam supported during her lifetime. Upon her death in 1997, approximately \$350 million of Mrs. Pulliam’s assets were used to establish the Trust, which will sunset after 50 years. As of December 31, 2018, the Trust holds approximately \$358 million in assets.

Overview of 2018 grantmaking



The Trust awarded
146
 grants in 2018 totaling
\$12,298,455

Over 21 years of grantmaking,
 the Trust has awarded
\$304,936,724
 to
989
 organizations

\$358 million
 Estimated endowment
 as of Dec. 31, 2018

The Trust’s audited financial statements will be available on the website after July 15, 2019.

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“Nina Mason Pulliam believed in lending a hand to people experiencing difficulty. She believed in education as essential to reaching one’s potential. She loved animals and nature. She devoted her life and her fortune to these causes. As we reach this milestone, we are thrilled to consider the extraordinary impact her bequest is achieving in our communities.”

– Carol Peden Schilling, trustee chair, Nina Mason Pulliam Charitable Trust

2018 portfolio and investment performance highlights

The Nina Mason Pulliam Charitable Trust conducts its financial affairs to the highest standards. The Board of Trustees along with the Trust staff and an external investment consultant oversee investments with the goal of maintaining or increasing the real value of the portfolio over the Trust’s 50-year life.

Nina Mason Pulliam Charitable Trust Financial Highlights

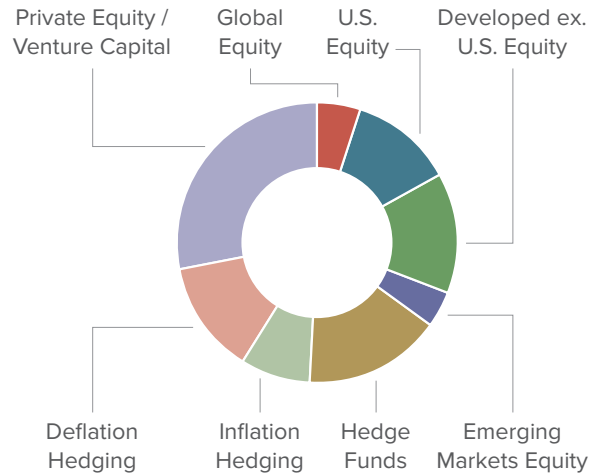
(Accrual basis, amounts in thousands)

	2018	2017
Total Assets as of Dec. 31	\$358,000	\$383,127
Financial Activities for the year ended December 31:		
Investment Income (loss), net of fees	\$(4,167)	\$47,693
Grantmaking and Administrative Expenses	(4,044)	(4,105)
Approved Grants and Scholarships	(12,342)	(23,638)
Federal Excise Tax Expense	(266)	(757)
Change in Unrestricted Net Assets	(20,819)	19,193
Unrestricted Assets Beginning of Year	368,030	348,837
Unrestricted Assets End of Year	\$347,211	\$368,030

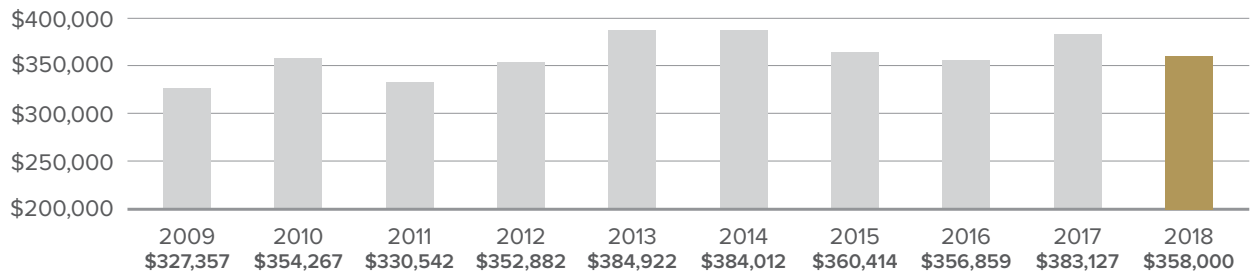
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Asset Allocation (as of Dec. 31, 2018)

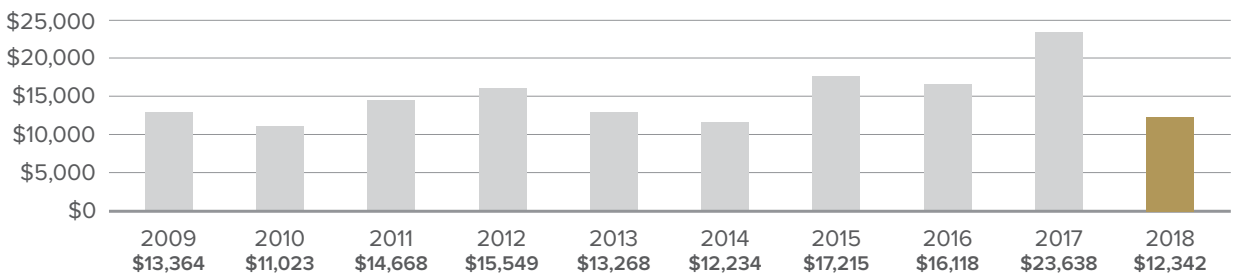
Global Equity	5%
U.S. Equity	12%
Developed ex. U.S. Equity	14%
Emerging Markets Equity	4%
Hedge Funds	16%
Inflation Hedging	8%
Deflation Hedging	13%
Private Equity / Venture Capital	28%
Total	100%



Fair Market Value of Assets (Amounts in thousands)



Awarded Grants (Amounts in thousands)



All 2018 figures are preliminary. Final amounts will be available on the Trust website after July 15, 2019.

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ABOUT THE TRUST

Nina Mason Pulliam

Nina Mason Pulliam (1906 to 1997) was a journalist, a business leader, a humanitarian and a lover of all creatures.

Nina Mason Pulliam was born in 1906 in rural Martinsville, Indiana, one of seven children. As a high school sophomore, she received her first compensation for a literary essay. She went on to study journalism at Franklin College in Franklin, Indiana, and later attended Indiana University and the University of New Mexico. After college, she took a full-time job at Farm Life, a national magazine published in Spencer, Indiana. When the magazine folded during the Depression, she went to work in Lebanon, Indiana, for an ambitious publisher named Eugene C. Pulliam. They were married in 1941.

During their marriage, the Pulliams traveled abroad extensively as a husband and wife team. They were among the first Americans to visit and write about post-World War II conditions in Europe. Over 11 years, Nina Pulliam was published in newspapers throughout North America and her articles were compiled into seven books.

Nina Pulliam was the founding secretary-treasurer and a director of Central Newspapers Inc., which Mr. Pulliam had established in 1934. Upon his death in 1975, she served as president of CNI until 1979 and was publisher of The Arizona Republic and The Phoenix Gazette until 1978.



She was a member of the first cohort of women admitted to Sigma Delta Chi, now the Society of Professional Journalists. Mrs. Pulliam also loved flying and was the first woman to earn a private pilot's license in Indiana. She was also known for her lifelong love of animals and for her nature conservation efforts.

Nina Pulliam was a compassionate business and civic leader, devoting many hours to civic, charitable, and community work. During her career she shared her financial success and business leadership skills with many charities in Indianapolis and Phoenix.

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About the Nina Mason Pulliam Charitable Trust

The Nina Mason Pulliam Charitable Trust seeks to help people in need, especially women, children and families; to protect animals and nature; and to enrich community life primarily in metropolitan Phoenix and Indianapolis. The Trust has awarded more than \$305 million in grants and student scholarships since its inception in 1997.

The Trust has offices in Phoenix, Arizona and Indianapolis, Indiana.

For more information, visit www.ninapulliamtrust.org.

PHOTO CREDITS FOR 2018 IN REVIEW

Thank you to the organizations that generously provided images for this report.

Cover: Alan Wlasuk, courtesy Humane Society For Hamilton County; The Society of St. Vincent de Paul; Osha Gray Davidson, courtesy Desert Botanical Garden; Indiana State Museum; Arizona State University

Welcome: Mark Lipczynski Photography; Child Advocates of Marion County; Tom Mueller Photography, courtesy Conner Prairie; Phoenix Zoo

Helping People in Need: IUPUI; St. Joseph the Worker; The Society of St. Vincent de Paul

Environment: The Nature Conservancy in Arizona; Routt, courtesy The Nature Conservancy in Arizona; Osha Gray Davidson, courtesy Desert Botanical Garden; Tom Mueller Photography, courtesy Conner Prairie

Animal Welfare: Midwestern University; Ashley Tremain, courtesy Every Dog Counts Rescue; FACE

Enriching Community Life: Indiana State Museum; Museum of Northern Arizona; Phoenix Zoo; Jen Siska, courtesy Common Sense Media



NINA MASON PULLIAM
CHARITABLE TRUST

Building a Legacy of Community Grantmaking since 1998

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