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Investing in Excellence

Celebrate Life through Legacy at The University of Arizona
The Norton School of Family and Consumer Sciences

John and Doris Norton – UA ’50
Established an endowed chair through a cash gift

Doris and I believe deeply in the mission of the School—strengthening families, communities and the marketplace. There is so much real value in creating strong and lasting connections through one’s legacy. By establishing our gift, our students can achieve heights of excellence to become dynamic members of society and achieve unlimited possibilities.

Pam Turbeville – UA ’72
Established an endowment for the future through her life insurance gift funded annually

I found so much richness in my college experience that I want to pass along my passion so that others will have the same opportunities that were given to me when I was here.

Investing in Excellence
A concern for society, a focus on hands-on experience and cutting-edge research unite the programs in the John and Doris Norton School of Family and Consumer Sciences. Whether you are interested in helping troubled families, teaching parenting skills, or developing a retail business, the School offers nationally acclaimed programs. No graduate leaves the Norton School without opportunities for hands-on experience in the field and a head start on a future career.
Soyeon Shim, Ph.D., Professor and Director
Norton School of Family and Consumer Sciences

To position the Norton School as the nation’s best requires academic excellence and constant investment in programs and people. Exceptional programs and state-of-the-art facilities help attract and retain exceptional faculty, who in turn, attract the best graduate and undergraduate students.

With our $25 million McClelland Park facility complete, we must continue building new, vibrant and premier programs that will impact every facet of our communities, our nation and the world. The Norton School’s endowment initiative is designed to be as enduring as the purposes we support. Today, we set our sights on the first phase of this journey - $25 million by 2014 - to celebrate the 10th anniversary since naming the school in honor of John and Doris Norton. With a goal of $50 million by 2020, we have much to do to ensure our programs are successful into the future. I urge you to join us in creating this lasting legacy to make an enduring impact on countless lives, from faculty and students to the people and families who benefit from our research and programs.

Help us achieve our goal of
$25 million by 2014,
$50 million by 2020.

What is an Endowment?
Endowments are permanent funds in which the principal is held in perpetuity and only the investment income is expended annually (payout).

Endowment gifts provide long-term sources of funding for the University. Endowed funds support activities not just for one year, or even one generation, but forever. Endowment funds are invested prudently to ensure they can sustain current and future needs.

Benefits of Establishing an Endowment
• Serves as a permanently named tribute
• Provides for future generations
• Provides lasting stability for UA research and faculty and student support

Endowment Support Areas
• Student Support
• Faculty Chairs
• Student Scholarships and Fellowships
• Teaching, Research and Outreach
Norman McClelland established an endowment in the Frances McClelland Institute for Children, Youth, and Families.

My late sister, Frances, and I believe in the importance of the family unit as a fundamental component of a successful society. Through Frances’ bequest gift, she wished to help the Norton School and its faculty conduct more and better research, training, and outreach aimed at improving the development of children and youth.

**Cooperative Extension and Outreach**

**Help us achieve our goal of $5 million**

**Legacy Gift Opportunities in Support of Cooperative Extension and Outreach**

**Extension Program Development Endowment**
Two (2) opportunities each @ $100,000 - $500,000
This named gift will provide an opportunity to support county and campus extension programmatic efforts (e.g., child development, youth development) that are of high priority in the state of Arizona.

**Extension County-Campus Faculty Liaison Endowment**
Two (2) opportunities each @ $100,000 - $500,000
This named gift will provide an opportunity for campus and county faculty members to collaborate on joint projects.

**Extension Internship Endowment**
Three (3) opportunities each @ $50,000 - $100,000
This named gift will provide an opportunity for students to pursue an internship opportunity in Cooperative Extension counties.

**Emerald Foundation**
**Established an Endowment for the Future to Honor Frances McClelland, Estate Gift**

The Frances McClelland Institute serves as a catalyst for cross-disciplinary research on children, youth, and families at the University of Arizona. It collaborates with campus and community partners alike with the goal of improving basic understanding to enhance the lives of the people in Arizona and the world. The research is framed around initiatives that address questions important to the development and well-being of contemporary children, youth, and families. The Institute currently supports three research initiatives: Fathers, Parenting and Families; Adolescent Health and Development; and Health, Emotions and Relationships. Through the Frances McClelland Institute, Frances will be honored in perpetuity for her belief that a successful society depends on the well-being of its children and families.


My late husband, Ralph, and I wanted to support the educational and outreach mission of the Norton School, and we are happy to see our gift invested in creating the Shirley Jo Externship Program for Cooperative Extension.
A legacy gift will strengthen families, communities & improve the lives of families.

STEPHEN T. RUSSELL, PH.D.
FITCH NESBITT ENDOWED CHAIR
DISTINGUISHED PROFESSOR AND DIRECTOR

Our long-term goal is to build a $15 million endowment to provide an annual operating fund to sustain the research, outreach, and impact of the Frances McClelland Institute (FMI) in perpetuity. Endowment earnings will support work for which there are few federal or foundation grant opportunities but that has important implications for the mission of the FMI: community outreach publications and programs, the training and outreach of FMI student ambassadors, student research projects/ internships, and seed money for research capacity building to attract external grants. Our goal is to be a catalyst for cutting-edge research on issues important to children, youth, and families in Arizona and the world.

Through fundraising and numerous donations, the Institute has built the Lang Children and Family Observation Lab—a state-of-the-art research facility with audio/visual and biophysical capabilities that is available for use by persons affiliated with the Institute as well as by outside researchers. In addition, the Institute is able to provide support in the form of space and outreach assistance to affiliated researchers and faculty, as well as to visiting scholars and post-doctoral students.

Help us achieve our goal of $15 million

RUTH NESBITT – UA ’50
ESTABLISHED FITCH NESBITT ENDOWED CHAIR
THROUGH A CASH GIFT

My late husband, Tom, and I believe in attracting and retaining the best and brightest faculty members for future education. We were happy to establish an endowed chair in honor of both the Fitch and Nesbitt families.

Frances McClelland Institute for Children, Youth, and Families

Student Internship, Research or Professional Development Endowment
Ten (10) opportunities @ $10,000 - $100,000
This named gift will provide an opportunity for students to pursue research internships as well as professional development opportunities related to research.

Institute’s Programmatic Endowment
Five (5) opportunities each @ $1,000,000 - $3,000,000
This named gift will allow the Institute to strengthen one or more of the Institute initiatives: Adolescent Health and Development; Health, Emotions and Relationships; Early Childhood; Culture and Diversity in Families; or other emerging areas.

Assistant Director or Professor of Practice Position Endowment
One (1) opportunity @ $250,000 - $500,000
This named gift will allow the Institute Director to establish an assistant director in support of the Center’s day-to-day interaction with students and community partners.
Mike and Mary Hall, Chairman and COO, TCA, Inc.
Established the TCA Institute through an annual cash gift for endowment

Through the endowment gift, we have partnered with the Norton School to establish the TCA Institute, the first of its kind in the nation, to make an impact on financial education, research and outreach.

Jane Larriva Rojas – UA BA Ed ’79
UA MBA Finance ’82
Established an endowment for the future through her estate gift

I feel passionate about finance and education as not only were these the basis of my education at the UA, but I practice them every day and have over the last 27 years as a Financial Advisor. Because of this passion, I have been on the Board of TCAI since its inception and I am establishing an endowment for the future through my estate gift.

Family Economics and Financial Education (FEFE) is an educational program promoting financial literacy working with the Take Charge America Institute (TCAI) for Consumer Financial Education and Research. The mission of FEFE is to provide educators with ready-to-teach lessons plans and materials free of charge, and the skills and confidence to effectively teach personal finance. The team of Master Educators create curriculum for financial workshops which are taught across the United States. These research-based workshops provide interactive and relevant lessons which help promote responsible financial decision-making.
Economic health and financial well-being is possible for future generations through legacy planning today.

Michael Staten, Ph.D.
Take Charge America Institute Endowed Chair
Director, Take Charge America Institute

Research shows that family financial distress too often contributes to marital problems, broken homes, extended illnesses, declining work performance, and diminished quality of life. The Take Charge America Institute (TCAI) was founded on the belief that at least some of these woes could be prevented by long-term investments in educating young people on how to manage their money and make informed financial choices as they move into adult life. But the resources of the public schools are already stretched thin. In response, the Institute has organized a national network of scholars and educators to create research-based economic and financial education outreach programs, funded in large part through private-sector gifts and grants. TCAI’s unique community engagement model partners with schools, state and federal education agencies and community organizations to give classroom educators the skills, confidence and curriculum they need to raise financial literacy and improve the economic reasoning of young adults.

Help us achieve our goal of $15 million

The Institute’s mission is to create research-based educational outreach programs to improve financial literacy and help consumers to make informed financial choices in today’s complex markets. A major endowment gift to the University of Arizona in 2003 from the credit counseling agency Take Charge America established the Institute. Located in the Norton School of Family and Consumer Sciences, the TCAI has focused its efforts during its first five years on educating young people how to manage their finances and make informed choices as they move into adult life.

Take Charge America Institute for Consumer Finance Education and Research

TCAI Director’s Excellence Initiative Endowment
Two (2) opportunities each @ $100,000 - $500,000
This named gift will allow the Director to use the funds for specific Institute priorities and new initiatives to meet the continually changing societal needs.

Family Economics and Financial Education (FEFE) Endowment
One (1) opportunity @ $10,000,000
This named gift will provide enduring sustainability for the FEFE program in perpetuity for years to come.

Office of Economic Education Endowment
One (1) opportunity @ $5,000,000
This named gift will provide a strong infrastructure to offer economic education for teachers in the state of Arizona and beyond.

Assistant Director or Professor of Practice Position Endowment
One (1) opportunity @ $250,000 - $500,000
This named gift will allow the Institute Director to establish an assistant director position in support of the Center’s day-to-day interaction with students, industry, and community partners.
Terry J. Lundgren – UA ’75
Established an endowment for excellence through cash gift

I am proud to lend my name to the University of Arizona’s stellar program, and its excellent Center for Retailing. I encourage you to join in the program’s enduring vision to ensure that our students acquire the skills to positively impact the future of generations to come.

Dr. Ellen and Mr. Phillip Goldsberry Endowment
Established an estate gift in support of students

As the founding center director, I am proud of establishing our legacy gift of the Phillip and Ellen Goldsberry endowment in the Terry J. Lundgren Center. By establishing our estate planning gift today, we can ensure that tomorrow’s young retail leaders can realize their potential through both our scholarship and through experiential learning opportunities offered by the center.

Being the recipient of the Ellen and Phillip Goldsberry Scholarship during my senior year has allowed me to start saving money to begin my career upon my graduation. Since I was very young I have dreamed about working in New York, and am extremely thankful that I was granted the opportunity to be able to save money to make that dream come true. I cannot accurately express my deep gratitude for Ellen and Phillip Goldsberry for choosing me as their scholarship recipient for the 2009-2010 school year.

Stefanie Mackler

Phillip Francis, Chairman, and Bob Moran, President, PetSmart
Established an endowment for distinguished professorships through annual cash gift

PetSmart is committed to education and workforce development in the community. We are happy to partner with the Terry J. Lundgren Center for Retailing in attracting and training the best and the brightest future leaders of retailing.
Ensure the success of our future retail leaders through your legacy.

Melinda Burke, Director
Terry J. Lundgren Center for Retailing
PetSmart Professor of Practice

The Terry J. Lundgren Center for Retailing at the University of Arizona brings together the resources and expertise of academia and the retailing industry. These two very different entities share a common goal: to develop strong future industry professionals. Combining resources from different ends of the retailing spectrum produces benefits not possible any other way. The partnership created between industry and the Lundgren Center creates a distinctive learning experience for our students and leads to a successful career transition.

The mission of the Lundgren Center for Retailing is to offer a wide assortment of professional development opportunities that support our unique Retailing and Consumer Sciences major and play a critical role in the preparation of our graduates and future retail leaders. The endowment earnings will be used for the faculty mentoring of students, unique student learning experiences, student recruitment, retailing research, faculty support and other activities which support the mission of the Retail Center. With a $15 million endowment the Lundgren Center for Retailing will be impacting the future of the retailing industry for generations to come.

Help us achieve our goal of $15 million

Terry J. Lundgren Center for Retailing Endowment

TJLC Director’s Excellence Initiative Endowment
Student Leadership, Internship or Professional Development Endowment
Ten (10) opportunities @ $10,000 - $100,000
This named gift will provide an opportunity for students in Retailing and Consumer Sciences to pursue leadership development activities such as Students in Free Enterprise, internship, and other professional development opportunities.

Consumers, Environment, and Sustainability Institute (CESI) Endowment
One (1) opportunity @ $3,000,000 - $5,000,000
This named gift will allow faculty in Retailing and Consumer Sciences to develop an acclaimed research institute that provides the best instruction and consumer research on sustainable consumption.

Graduate Student Fellowship Endowment
Five (5) opportunities @ $50,000 - $100,000
This named gift will provide fellowships for graduate students in Retailing and Consumer Sciences to prepare for careers as teachers, researchers, and consultants.

Distinguished Faculty Endowment
Two (2) opportunities @ $1,000,000 - $1,500,000
This named gift will enable the Norton School to attract and retain top-notch professors to educate and mentor students in Retailing and Consumer Sciences.
Join us in our journey to secure the future of the Norton School of Family and Consumer Sciences for generations to come. The Legacy Initiative is about people becoming a part of something bigger than themselves. It is a special opportunity for you to make an enduring impact through planned giving, a bequest in your will, pledges over time, matched giving, cash and corporate donations. To a greater extent than ever before the reputation of our institution rides on the legacy we create today.

Join our Legacy Leaders

**JACQUE LA VISTA – UA ’68**
**ESTABLISHED AN ESTATE GIFT IN SUPPORT OF THE NEW BUILDING**

This is a once-in-a-lifetime opportunity to step up and take the lead and set the course for success for future generations. I know that my enduring legacy will empower another’s future.

**PRUDENCE HANEY – UA ’41**
**ESTABLISHED AN ESTATE GIFT IN HONOR OF HER MOTHER, IMOGENE JOHNSON MYRLAND**

Through my estate gift, I am happy to contribute to the cause of enhancing the well-being of children to which my late mother dedicated her lifetime.

**DENNIS AND CHRIS MILLER – PARENTS OF LINDSEY MILLER, UA ’06**
**ESTABLISHED AN ENDOWMENT IN SUPPORT OF FACULTY AND STUDENTS THROUGH CASH AND BEQUEST GIFTS**

Many times acts of charity have a limited effect for a short period of time. Giving through estate planning is an ideal way to have a lasting impact on future generations of students and at the same time demonstrate to surviving families and friends just how dearly the benefactor considers such a gift.

**AMY JEAN KNORR – EMERITA PROFESSOR**
**ESTABLISHED A SCHOLARSHIP ENDOWMENT THROUGH A CASH GIFT**

I’ve always held the belief that the Family and Consumer Sciences program served me very well and it is our pleasure to return the favor. By giving this gift, I’m becoming part of a special tradition that will inspire hope and create opportunities.

**NANCY AND GORDON J. GRAHAM, FORMER UA FACULTY MEMBERS AND ALUMNI COUNCIL**
**ESTABLISHED THE GORDON J. AND NANCY A. GRAHAM MEMORIAL ENDOWMENT THROUGH A CHARITABLE GIFT ANNUITY**

We believe that investing in the education of our youth through the Norton School of Family and Consumer Sciences is an important action to provide a positive future for individuals, families, communities and our country.
John and Doris Norton – UA ’50
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Many Ways to Leave Your Legacy

• Outright Gifts of Cash/Annual Giving – Pledge to make a one-time and/or an annual cash gift toward specific annual programs and/or endowment.

• Securities – Gifts of appreciated securities, such as stocks, bonds, or mutual funds, which can provide special tax advantages.

• Planned Giving or Bequest – A gift for the future – allows you to make significant gifts to the University of Arizona either during your lifetime or as part of an estate plan.

• Charitable Gift of Life Insurance – By naming the University of Arizona Foundation as either the owner or beneficiary of a life insurance policy, you can reduce your estate taxes while providing benefits to our programs.

• Real Estate – Gifts of real estate are sold quickly and converted into cash and used directly in connection with an existing University program.

• Corporate or Foundation Gift – Charitable gifts from corporations or foundations to a cause important to the organization.

$3 M-$5M+ Center/I nstitute endowment
$3 M+ Director’s excellence endowment (including endowed directorship)
$2 M+ Faculty endowed chair endowment
$1 M+ Distinguished professorship endowment
$500,000+ Teaching, research or outreach endowment
$100,000+ Student Service Center endowment
$50,000+ Graduate student fellowship endowment
$25,000+ Student scholarship endowment
$10,000+ Student or faculty educational support endowment

Celebrate Life Through Your Legacy
Make a lasting gift today – Make a difference tomorrow.

For more information please contact Soyeon Shim at shim@cals.arizona.edu or 520.621.7147
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