

Within the pages of this Report, you will find stories—representing only a fraction of the ingenuity, innovation and dedication of Southern California Grantmakers’ members—that exemplify the spirit of philanthropy and inspire us to reach out to our fellow human beings in pursuit of a better future for us all.

REPORT TO THE COMMUNITY

a window to the future

ADVANCING EFFECTIVE, RESPONSIBLE GIVING



SOUTHERN CALIFORNIA
GRANTMAKERS

*Generosity, innovation and social progress
—philanthropy embodies each of these values
and plays a unique role in American society.
Just as the traditional roles of government,
business and nonprofits are beginning to
shift, the way we organize philanthropy
will take on new forms in the next 20 years.
The fact is, Census 2000 set our country on
a trajectory toward an America that will
look vastly different from the one we know
today...*

REPORT TO THE COMMUNITY

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...Baby boomers are looking to the future and planning for their legacies. The second generations of immigrant families are moving into leadership positions. Women are emerging as a significant donor force. Amidst these changes, stronger communities will be inspired by a renewed sense of the common good. At Southern California Grantmakers we take great pride in playing a key leadership role in philanthropy through advocating involvement, promoting education and helping affect lasting change. We offer our members the strategies and tools necessary to meet, and take advantage of, the latest advances in the field of charitable giving.

“It is important that foundations share ideas and best practices to improve their level of accountability and effectiveness. Southern California Grantmakers provides a forum where funders can communicate, collaborate and learn how to strengthen their governance and operations to achieve a greater impact on the challenges facing the region's richly diverse communities.”

—**ROBERT K. ROSS, M.D.**
President and CEO
The California Endowment

P R E F A C E


Each member of Southern California

Grantmakers (SCG) brings to our organization a particular mission, funding strategy and organizational structure. Yet, within this diversity, our members gain a broad perspective from one another of how each distinct organization fits into a larger system of charitable practice. It is as part of this big picture that we grow stronger through a common vision of finding solutions, improving the quality of life for all people and making a lasting difference.

As a vibrant community of private sector grantmakers, SCG serves as a common voice for philanthropy. We maintain close relationships with our grantmaking peers at the local, state and national levels. We leverage strategic partnerships with those in the media and government who can amplify our collective voice. We reach out to individuals, families, businesses and corporations to emphasize the value of giving.

As educators, we are also constant learners, committed to bringing value to our membership through forums, roundtables and site visits that provide opportunities to engage in problem solving, in-depth dialogues and the sharing of best practices. We connect people, institutions and communities throughout the region to provide them with refined grantmaking skills. We foster camaraderie and a richer body of knowledge among our community of funders so that we may more effectively tackle complex social issues such as education, health, housing, employment and the future of our children.

In shaping the growth of philanthropy, SCG remains true to the highest standards of professionalism and ethical behavior. We promote a deep respect for diversity, and continue to advance effective and responsible giving for the public good.

Philanthropy plays an important role in social transformation. From lending a helping hand to affecting social change, philanthropy invests in our future. And in Southern California, the time is ripe for engaging and nurturing a new group of leaders for the 21st century. 

“At Sony Pictures Entertainment, we are dedicated to improving people’s lives through efforts that reflect the diversity of our businesses and our communities. Our involvement with SCG enhances these efforts by tying us to a broader network that helps better inform and target our giving practices.”

—**JANICE POBER**

*Senior Vice President Corporate Affairs
Sony Pictures Entertainment*

“Women need a space to make connections, to challenge each other and reach further for what they care about. It’s a journey we take together that, in turn, strengthens our individual convictions. SCG’s **WomenGive!** program provides a community that’s creating a tradition of giving and helps promote financial literacy. Collectively, the impact of the group is tremendous. We’re inspired by each other, and challenged to do more.”

—**CATHY SALSER**

*Trustee, Liberty Hill Foundation
Trustee, Salser Family Foundation*

Family foundations, the fastest growing segment of philanthropy in the U.S., provide a special opportunity for families to share an equally heartfelt commitment to each other and the causes they care about. At the same time, family foundations contribute to the distinctive character of America's charitable sector and provide a philanthropic legacy that continues the tradition of charity from generation to generation.

Lasting Family Legacy

Before “Champagne music” and television, a farmstead near Strasburg, North Dakota was home to Lawrence Welk. One of eight children born to German/Russian immigrant parents, Welk never forgot his humble beginnings, and spoke fondly about his family and birthplace, where he said he was taught to work and share. In 1960, the family-oriented band-leader with a penchant for “treating people right” founded the Lawrence Welk Family Foundation.

For many years, Welk’s daughter, Shirley Fredricks served as Executive Director, ensuring her father’s emphasis on straightforward principles and strong family values were reflected in the Foundation’s philanthropy and nurtured among the Welk children and grandchildren.

The leadership role passed from mother to daughter in 1997 when Welk’s granddaughter Lisa Parker took over as President and Executive Director. Today, second and third generations of the Welk family and their spouses serve board terms on a rotating basis. Each also participates in the selection of grantees and now the fourth generation is becoming actively involved in fundraising as well. The Welk family is also passionate about sharing their deep-rooted experience in philanthropy to help other family foundations find creative ways for involving future generations in their charitable work.

While the Lawrence Welk Family Foundation’s objective is to strengthen and enrich Southern California families and communities, the family’s goal is to ensure their philanthropic spirit lives on through each subsequent generation. As such, Parker is actively committed to strengthening the extended Welk family as they work together in support of organizations serving children and families living in poverty. To ensure grantmaking remains meaningful, Welk family gatherings typically include a report on recent Foundation activities, including stories that relate the human side of the Foundation’s grantees.


Just as Welk’s music has endured, his spirit lives on through the Foundation he created to help others rise from poverty and go on to prosperity—and through each generation of Welks who remains determined to passing on his legacy. 



Photo courtesy of The Welk Group, Inc.


Employee giving programs allow companies to integrate giving in the workplace with their overall philanthropic campaigns, encouraging a team effort that supports the company's community outreach and its role as a good corporate citizen. Above all, such programs are about people. They build morale and loyalty. Ultimately, they're good for customers, the community—and for business.

Corporate Citizenship

When baseball fans poured into Tuesday home games at Angel Stadium in Anaheim one recent summer, Southern California Edison (SCE) volunteers standing outside helped collect food or cash donations amounting to 16,370 pounds of food. Part of the “Halos Fight Hunger” program, this translated into more than 32,000 meals for families seeking assistance through the Second Harvest Food Bank of Orange County.

Giving has been key to SCE’s value system for 114 years and through its corporate employee volunteer program, “Energy in Action,” the enthusiasm and concern employees have for their communities is leveraged into measurable actions that strengthen neighborhoods and improve lives. Edison employees may volunteer for any company approved or qualified 501(c)(3) non-profit organization. Employees can also join forces with their business unit to adopt a charity and participate on a team in a department volunteer or fundraising activity.

As a result of Edison’s innovative employee giving model, close to 50 percent of the workforce gives in some way. In 2003 alone, 1,100 SCE employees volunteered—equating to \$6 million in hours to the community—in addition to giving over \$3.5 million in monetary contributions. And, by supporting over 320 different community projects, Edison volunteers are helping to generate positive, lasting change.

Beyond the dollars, beyond the volunteer time, SCE employees also help nonprofits in the communities where they live and work through their business expertise. This translates into a variety of energy conservation and efficiency ideas, many of which are provided through SCE’s Web site, in the form of tips, interactive online tools and rebate opportunities. This enables nonprofits reduce energy use and save money. 



Effective philanthropy can be likened to building bridges. These bridges create vital links between foundations, organizations, civic leaders and neighborhood residents.

When these bridges extend to the most under-represented populations of a community, the community as a whole becomes stronger, better informed and more involved.


Represents the Under-Represented

Maria Candelaro came to the U.S. from Mexico at age five. Now a 16-year-old junior at Conejo Valley High School, she is one of 30 Latino teens working alongside doctors at the Westminster Free Clinic in Thousand Oaks through HEALTH Matters, a training program that enables teenagers to look to their own futures and see the real possibility of a career in medicine. The innovative program is one of many recipients of a grant from Destino: The Hispanic Legacy Fund of the Ventura County Community Foundation (VCCF).

Destino is the only endowment fund dedicated to meeting the needs of Ventura County's Latino community. Prior to its establishment in 1996, there was no comprehensive or county-wide effort to engage Latinos in philanthropy. A series of neighborhood-based dialogues, conducted by VCCF, confirmed the need to both attract more funding to address issues facing the Latino community as well as to engage Latinos in organized philanthropy. Thus, Destino was founded—in partnership with local Latino and community leaders—to provide opportunities for the economic, educational, physical, emotional, social, artistic and personal growth of Latino youth and families.

In order to ensure Destino's success, its founders sought meaningful and ongoing representation from community leaders, including Latino small business owners, political leaders and teachers. They also involved companies that employed Latinos in their businesses, such as agriculture, as well as organizations interested in marketing their products to the Latino community, including banking and telecommunications. All of these stakeholders had a voice in the founding of Destino.

Today, a grantmaking committee of "Founders" (individuals who have donated \$1,000, businesses that have donated \$2,500) actively participates in the grantmaking process, voting on the programs that will receive support. Destino is also building a permanent source of funds to address pertinent Latino issues with a special emphasis on health care services including AIDS, preventative care and educational programs. Annual earnings from the fund are used to award grants. To that end, Destino continues to engage new volunteers and supporters toward securing their \$1 million permanent endowment goal.

Since its inception, Destino has awarded \$366,549 in grants that have benefited more than 11,000 Latino youth and adults, and provided 64 grants to 32 Latino community organizations in Ventura County. These grants make possible organizations like HEALTH Matters, which enables Latino teenagers like Maria Candelaro—who has decided to be a nurse—to look forward to a rewarding career. 



Funding collaboratives provide a valuable opportunity to bring together foundations, corporations and local government agencies with community leaders to address common issues and challenges, obtain unique input and strategically leverage grantmaking to help solve critical community-based issues. These efforts result in far greater results than each organization could achieve individually.


Working Together

The story of LAUF is about a group of funders who achieve more together than they could alone. It is a story about a long-term commitment to working with the ups and downs of neighborhood dynamics. It is about building sustainable organizations and networks in communities.

Located in east San Fernando Valley, Pacoima is one of three low-income communities benefiting from Los Angeles Urban Funders (LAUF) comprehensive community-building initiative. A project of SCG that began in 1996, LAUF made a 10-year commitment to improve conditions and help Pacoima, Vermont/Manchester and Hyde Park become stronger, more self-sustaining communities. LAUF recognized the complex interdependence of the social, economic and physical aspects of neighborhood revitalization, bringing together funders, corporate executives, public policy makers and community leaders to share their collective wisdom toward resolving each community's most pressing issues.

In Pacoima, LAUF partnered with the Family Care/Healthy Kids program, a network of school-based parent centers providing a range of support services to advance safe, healthy and nurturing family environments. Working with this already established network, LAUF conducted economic literacy seminars and extensive door-to-door outreach. Through school-based focus groups and resident-driven surveys, barriers to successful employment were identified.

LAUF coordinated a systems approach to help the community overcome these barriers. A unique ecology of nonprofit organizations working on these issues was identified. An industry network of employers was formed by business type to streamline training and placement. Parents were trained as career coaches responsible for intake and screening of job candidates. These activities ultimately resulted in the formation of a Workforce Development Initiative that is now housed at the Valley Economic Development Center. To further facilitate financial independence of residents, LAUF member Wells Fargo opened a Pacoima branch.

Los Angeles Urban Funders created new ways for funders to think about grantmaking, to work together and to manage a network of nonprofits in order to ensure a comprehensive response to community needs. 



The philanthropists of the next generation—like those who came before—will be influenced by the attitudes, inspiration, guidance and opportunities presented by the current generation. Therefore, passing the torch of philanthropy is an ongoing effort of engaging young people in experiences that demonstrate the importance of philanthropy: creating enthusiasm by example and exhibiting giving that's valued first for its practice, regardless of the size or scope.


Generosity

What better way to teach young people to be charitable and nurture the philanthropic leaders of the future, than by allowing them to make grants that make a difference in and around the cities where they live? The Philanthropists Program at Orange County's Newport Harbor High and University High, sponsored by Pacific Life in association with other members of the Orange County Community Relations Council, such as the Fluor Corporation, does just that.

Providing a leadership experience that teaches high school students the value of philanthropy and the nonprofit sector, the Philanthropist Program leads participants through a yearlong process whereby they learn the process of grantmaking through hands-on practice in real life situations. Students learn how grants are applied for, how to write an RFP, conduct site visits and evaluate proposals. They survey their own student body to determine critical issues in their community, develop a mission statement, create a fundraising plan to raise a minimum of \$500 and

ultimately make actual grants. A Pacific Life representative meets with the student group throughout the year to provide information, technical assistance and arrange enrichment activities, and the company contributes a total of up to \$4,500 through the program's fiscal agent, the Orange County Community Foundation, to each student group.

While the grants awarded by the students are relatively small, they clearly demonstrate the value of giving. For example, students recently awarded a grant to a City of Irvine program that transports mentally disabled young people. Through the students' support, these passengers were provided with much-needed cell phones that allow them to alert the necessary people in the event of urgent or unusual circumstances and that empower them with an all-important measure of autonomy.

For Pacific Life, nurturing philanthropy at the high school level is a natural extension of its long-standing commitment to making a positive and ongoing difference in the community. As for the high-school-based philanthropists, the program continues to enlighten students as to how even a small grant can make a huge difference. Many participants who have since graduated are going on to careers that will find them once again giving back to their community. 

“By providing opportunities for young people to participate in the grantmaking process and become leaders, we also enable them to experience the joy of giving, along with the rewards of making a difference. Perhaps this is the greatest gift we can give to generations to come.”

— MIYOKO OSHIMA
President

Southern California Grantmakers

Philanthropy provides a unique opportunity in American life for individuals to act on their passions for the common good. Foundations, corporations, government and communities are forming philanthropic partnerships to pave the way for our next generation of civic leaders. Together we are building a future in which the spirit of giving thrives.

“What thrills me about this work is the human capacity for generosity and collaboration. Giving is at the core of a civilized society. It strengthens us as a people, fulfills the spirit, and makes the future brighter for us all.”

—CLAIRE PEEPS
Executive Director
The Durfee Foundation

*We welcome your comments, thoughts and questions.
Please contact us.*

SOUTHERN CALIFORNIA GRANTMAKERS

350 SOUTH FIGUEROA STREET
SUITE 270
LOS ANGELES, CA 90071-1201

213 680 8866 EXT. 0

FAX 213 680 8730

INFO@SOCALGRANTMAKERS.ORG

WWW.SOCALGRANTMAKERS.ORG