

Building the Valley's Philanthropy Presence

April 29, 2016 12-2 pm

Valley Presbyterian Hospital – Fleming Education Center

Meeting Summary – Observations and Possible Next Steps

This small brainstorming lunch brought together individual philanthropists, foundation and corporate philanthropy leaders, and leaders of infrastructure organizations to discuss ways in which the presence of Los Angeles philanthropy in the San Fernando Valley can be increased. During the meeting a number of observations were made about the Valley's connections with philanthropy, and some possible next steps to increase those connections were discussed. This summary is being shared with meeting participants and organizers, to determine whether some next steps might be taken and who would lead them.

Observations About the Valley and Philanthropy

- There are deep pockets of need in the Valley (both among individuals and nonprofits serving this need), and it is important to get the story out about these needs to those on “the other side of the hill”
- In particular, there are huge issues of poverty in the Valley (around homelessness, health care, and other challenges) which even many Valley residents don't know about
- Many donors South of the Boulevard in the Valley do most of their giving on the other side of Mulholland, especially where larger gifts are concerned
- Many Valley nonprofits have limited skills for fundraising, particularly in getting larger gifts from individual donors
- The development infrastructure for Valley academic institutions in the Valley is smaller than for their counterparts in the rest of Los Angeles, especially the Westside (for example, compare CSUN and UCLA – although CSUN is working to build its fundraising capacities)
- Some major donors like David Nazarian (who gave \$10 million to CSUN), feel they get “more bang for their buck” in the Valley
- On the other hand, some Westside donors feel they get the “bigger bang,” particularly in terms of public awareness through channels such as the *Los Angeles Times*, which tends to pay more attention to the Westside than the Valley
- Increasingly major donors want to see the impact of their donations while they are alive – this is true regardless of geography
- Many major donors have already given or have identified their strategic giving plan, so they are not as open to approaches for additional major gifts
- Sometimes philanthropy is the end of the conversation with donors, and sometimes it is the beginning – Valley fundraising needs to be sensitive to this diversity
- Getting major donors together can be a problem of egos – “Eagles don't flock together”

Possible Next Steps

- We need an organized list of the top 200-300 wealthy people who live in the Valley – this could be brought together by analysis of data we already have access to
- The UCLA individual giving study found that people in Encino gave less – this is hard to figure out, and one suggestion for better understanding it is to approach the Valley Alliance about possible sources of data for Jewish donors in that community
- Networking organizations for Latino and Asian businesses in the Valley, if they exist, could help to identify potential donors in these two communities
- An approach to Armenian donors could yield important results
- A small group of Valley leaders who either are major philanthropists or who have access to wealthy people and success in obtaining donations (one suggestion for the latter was Blair who helps coordinate the LA Family Housing annual gala, and works for an entertainment company) could be brought together to brainstorm about how to elevate the presence of philanthropy in the Valley – this could lead to a long-term investment in relationship building for the Valley
- Some Valley nonprofits like MEND have very large volunteer programs, whose leader volunteers might be queried about how to elevate the presence of philanthropy in the Valley
- Farmers Insurance wants to invest in volunteer opportunities for their staff, and might learn from other corporations that already have volunteer executive programs such as Bank of the West
- There is an informal group called LA Community Leaders that might be part of an exploration of Valley philanthropy
 - Farmers Insurance could host a future meeting of an informal group (perhaps some or all of the people who attended this meeting, plus others) to look at the challenges and opportunities for building the presence of philanthropy in the Valley
 - VNR's Platform with its geo-mapping function might be adapted to identify corporations and family foundations in the Valley and their philanthropic interests
 - Boston Private Bank has wealthy clients, some of whom might be interested in helping to explore Valley philanthropy; they could be approached at one of the Bank's future small cultivation events
 - Bus tours of key nonprofits and high-need communities in the Valley (Northeast Valley, Canoga Park, Reseda) could bring donors and philanthropic leaders from foundations and corporations together for a learning experience (SCG has coordinated this for the Inland Empire)
 - The Funders Collaborative Inland Empire could be a model for future activity in the Valley
 - Irvine Foundation sponsored an SCG annual conference pre-session in 2015 for the Inland Empire – this might also be done for the Valley, with a major funder to sponsor
 - United Way has set as a goal becoming more geographically focused, and this might be aligned with future activity in the Valley
 - Valley Nonprofit Resources has ongoing educational and TA activities for Valley nonprofits focused on philanthropy and fundraising, and these could be coordinated with follow-up to increase the presence of philanthropy in the Valley
 - SCG activities such as the Family Foundation Information Exchange, the new LA County office for philanthropy, and other activities could be adapted to the Valley as part of a follow-on, as has been done recently in other Southern California regions.

Participants

Raymond Cole, Farmers Insurance
Doris Dunn, Farmers Insurance
Mark Eiduson, William C. Bannerman Foundation
Wendy Greuel, Greuel Family Fund
Carol Kim, Health Net Foundation
Joy Picus, Community Leader
Nuka Solomon, United Way
Anneli Stone, W.M. Keck Foundation
Jimar Wilson, Boston Private Bank & Trust Company

Organizers

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