



**CASE STUDY:** PARTNERING FOR A LASTING LEGACY

## Collaborating to Carry Out a \$12.5 Million Testamentary Gift for Impact

Many donors at the **California Community Foundation (CCF)** are deeply aware and moved by the opportunities and challenges that are faced in Los Angeles County. For one donor, it was an article in the *L.A. Times* that highlighted the lack of enrichment opportunities for youth in South Los Angeles and the South Bay that sparked an idea for how she could help.

As a musician and lifelong lover of arts and recreation, the donor knew that access to extracurricular activities can have a lasting impact on school performance and interpersonal skills and help to foster feelings of inclusion. While the donor chose to remain anonymous, her wishes were clear. Through a one-line directive in her will, she outlined a \$12.5 million-dollar legacy gift and the goal of impacting as many youth as possible.

### Interpreting a Donor's Wishes and Vision With Legal Expertise

Upon the donor's passing, it was up to her family to interpret her wishes and execute her vision. Knowing they didn't have the expertise to bring this posthumous vision to fruition, the family contacted the CCF development and donor relations team because of their demonstrated experience in accepting and providing critical legal interpretation of testamentary gifts. For this family, it was

critical to partner with a local foundation that had both a reputation for upholding philanthropic intentions and strong ties to Los Angeles' nonprofit community. CCF was the ideal partner.

### Executing a Timely and Community-Focused Grant Strategy With Nonprofit Expertise

To honor the donor's passion for fostering the potential of local youth, the initiative was named Preparing Achievers for Tomorrow – also referred to as PAT.

An ambitious five-year timeline for the gift to be granted out entirely was established, but the family wasn't just looking to simply disperse funds to various organizations. They wanted to identify solutions to make the legacy last past the initial five years.

CCF took on the task of overseeing the selection process. The first step was to establish the criteria to qualify for funding. Working closely with the donor's family, CCF crafted specific guidelines for recipients:

- Proven success in providing music, sports or recreation programs for low-income, underserved youth ages 14-18

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To date, more than 40,000 students have been helped by over 50 PAT programs.

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- Can track quantitative client outcomes to maintain youth participation
- Proven ability to secure matching funds
- Sustainable plans for the project beyond the funding period
- Established partnerships with South Los Angeles and South Bay high schools
- Strong organizational leadership

### Leveraging a Gift for Lasting and Exponential Impact

A major part of that vision was ensuring the sustainability of each organization. Support was provided in areas such as marketing, communications, development, financial planning, capacity building and strategic planning. PAT grant recipients were invited to participate in technical assistance meetings to learn how to complete CCF's reporting requirements, administer pre- and post-program youth surveys, and track grades and attendance.

Also, the family wanted to ensure that youth benefiting from these programs had increased access to professional mentors and exposure to alternative business career opportunities, so CCF leveraged a vast network to support the nonprofit grantees in building this aspect of their programming.

### A Donor's Dream Realized With CCF

Since its inception in October 2011, the PAT initiative has made a significant and lasting impact in the Los Angeles community. To date, more than 40,000 students have been helped by over 50 PAT programs – a number of whom had never received a grant prior to PAT. Many of the nonprofit organizations that have received a PAT grant operate with annual budgets under \$500,000. This additional funding has been invaluable in providing the youth they serve with new experiences and skills, along with enabling the nonprofits to strengthen and grow their operating structures.

Jonathan Zeichner, Executive Director of A Place Called Home, shared that their organization was able to increase its operating budget by \$2 million since its initial PAT grant in 2011. As Jonathan explains, "Thanks to PAT, we could expand how many people we were serving, attend trainings and hire expert staff. PAT allowed us to lay track for the long term."

The story of PAT reflects how one person with a passion for helping youth and a vision for how their legacy can make a difference can impact the lives of thousands. By working with CCF, clients like the family in this story can ensure their loved one's vision is realized and go far beyond what they had ever dreamed.

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Please feel free to contact your Relationship Manager or the Donor Relations Team at [donorrelations@calfund.org](mailto:donorrelations@calfund.org) if you have any questions. We are here to help.

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