



## Back to the Future CCF Helps Grantees Prepare for Uncertain Times

CCF surveyed 112 grantees to find out their needs and challenges, then held five workshops Dec. 8-12, 2008 to offer help with online giving, planned giving and provide management support resources.

Funding resources, strategic planning and board development are the greatest challenges grantees said they face during these changing economic times.

Most grantees have already streamlined their operations, the survey found, including hiring freezes, staff layoffs and canceling major fund raising events or activities.

The survey also found that:

- Foundation grants and government funding make up nearly half of their funding.
- Most identified individual giving/major gifts (11 percent of funding) as their most critical fundraising need.

The workshops raised awareness about CCF's services. Before the workshops, 81 percent of grantees were not aware of online giving options and 74 percent did not know about year-end giving services.

*"We were successful in helping our grantees think about their futures, learn about CCF and the role we can play in that future,"* said John E.

## Guide to Effective Giving

Donor turns love of nonprofits into business

CCF scholarships make college a reality for low-income students

## What's Happening at CCF

### Fourth-quarter and 2008 grants

The foundation made 1,598 grants totaling \$34.7 million to the community through its foundation-directed and donor advised funds. For 2008, CCF made a total of 6,390 grants for \$228.4 million.

### Sylmar Wildfire Victims Still Need Help

CCF raised \$184,572, including the foundation's match of \$92,286, for relief and recovery efforts in the aftermath of last fall's wildfires in the Sylmar area. CCF has distributed three grants totaling \$150,000. To donate, go to [www.calfund.org](http://www.calfund.org).

More inside



Grace Cheng Braun of WISE & Healthy Aging, a human development grantee

Kobara, CCF's senior vice president of external and donor relations. *"This is just the start of a work in progress."*

CCF is helping to preserve and sustain grantees by:

- Expediting grant renewals for top-performing grantees and giving no-cost extensions to others so they have more time to meet their grant objectives.
- Serving as a no-cost back office for planned giving.
- Providing access to local Management Support Organizations for low and no-cost consultation and training in areas like strategic planning, board development and fundraising.
- Providing a planned giving toolkit with information about an array of services CCF offers that go beyond the grant.

Webinars will be held on Feb. 3 and Feb. 5, 2009 to brief donors and others about the workshops. For more information, go to [www.calfund.org/learn/webinars.php](http://www.calfund.org/learn/webinars.php).

# What's Happening at CCF

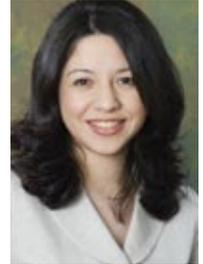


Reveta Bowers

## First African American woman named board chair

**Reveta Bowers**, head of school at The Center for Early Education in West Hollywood, took over as chair of CCF's board of directors on Jan. 1, succeeding Jane B. Eisner.

**Also: Rosie Arroyo** was named board/community relations liaison; **Terri Mosqueda** became the donor relations officer, managing the donor relations team; **Mary Anne Doyle** is the new director of organizational learning and lawyer **Edward Mullen** is the new estate and gift planning officer.



Terri Mosqueda

## What Grade Does LAUSD Get?

The Los Angeles Unified School District released its first ever report card Jan. 12 on how its schools are doing.

The California Community Foundation helped fund the

report card, which parents can use to hold LAUSD accountable for their children's progress. A link to the report card is on our Web site at [www.calfund.org](http://www.calfund.org).

# Enjoy Great Payout Rates for a CGA

What is a **Charitable Gift Annuity** or CGA? It is a contract under which a charity, in return for a transfer of cash or stock, agrees to pay a fixed sum of money for a period measured by one or two lives.

### Why CGAs are attractive now:

#### • Present-Life and Deferred-Life:

Present-life gift annuities begin payments immediately and are for participants 65 and older. Deferred-life gift annuities are available for participants as young as 45 years old with payments beginning as soon as one year from the date of gift.

#### • Timing:

When interest rates are low and stock markets are volatile, **Charitable Gift Annuities** are a great way to go. CCF follows the payout rates set forth by the **American Council on Gift Annuities**, which has a maximum rate of 9.5 percent for those 90 and older. Contact Natalie Cowan-Birch, gift planning assistant, for the current rates at (213) 413-4130.

## Join CCF's Legacy Society

CCF welcomes our newest members of the Legacy Society: Bunny Olds, William and Mona Brehm, John and Sarah Kobara, Kathleen and Paul Sundmark, and Dana Baldwin.

Started in 1995, the Legacy Society honors forward-thinking people who leave an unrestricted gift to the foundation through a will or trust. This permanent source of funding is an easy way to make sure that your donation will support Los Angeles' most pressing needs, now and into the future. To join this group of committed philanthropists who are invited to exclusive events and acknowledged in our publications, call Carol Bradford, director of gift planning, today at (213) 452-6266.

## Ready to Make Grants? Read This

If your fund is in the permanent pool and you are planning to distribute more than 60 percent of your fund's assets at any given time, please take note of our payout policy. Generally, 60 percent of the fund balance would be distributed within the typical processing time, and up to 40 percent of the remaining fund balance would be distributed two to six weeks later. This is to give time to account for market fluctuations and allocate other expenses such as investment manager fees. Because the foundation's assets are co-mingled and invested in different pools, a fund can exit the permanent pool only after these factors are accounted for. Contact our grants coordinators to inquire about your fund's investment pool at (213) 413-4130.

# Meet a CCF Donor

## Erickson's Love of Nonprofits Is Good Business

For Gary Erickson, helping his community extends beyond the grants he gives through his CCF fund. The former probation officer, who grew up in Exeter in central California, enjoyed volunteering so much that he made it his business to help strengthen nonprofits.



Gary Erickson with sons Robert (left) and Greg (right).

*"When you're raised in a very small community, volunteering is part of what you did,"* said Erickson, who has 30-plus years of experience working with community-based nonprofit organizations. *"I was literally so enamored in my volunteer role, it went from avocation to vocation."*

Today he is president and CEO of The Erickson Group, a consulting firm he started in 1988 to help nonprofits in strategic planning, program development, board development, marketing and fundraising. The firm recently raised \$17 million from the private sector to help the Downtown Women's Center, a CCF grantee, with a successful \$35 million campaign to build a new facility.

Erickson is also on the board of the Ventura County Community Foundation, which CCF helped incubate in 1987. He has been director of development at California Lutheran University and executive vice president for United Way of Los Angeles.

Through the Erickson Family Fund at CCF, his two sons can continue his philanthropy after he's gone to help new nonprofits. Today both are giving back to their communities in different ways. Greg, 35, is the program director for the Peninsula YMCA in San Diego and Robert is a strong safety for USC's football team.

Erickson says he is a better philanthropist because of CCF. *"It's great to have someone who manages the process of giving and also shares information to help people make good philanthropic decisions,"* Erickson said.

“In most cases with charitable funds at commercial vendors, it's money in and money out. CCF, though, is involved in the community. If you want to make a difference, CCF knows which nonprofits are making an impact.”

—Donor Gary Erickson

*"I'm a Legacy Society member and the seminars, educational programs, newsletters and initiatives around key issues are very helpful. Just because I'm more involved than the average person doesn't mean I know everything about everything."*

## Erickson's Tips for Nonprofits

Here is some advice from nonprofit consultant Gary Erickson for organizations struggling during these uncertain economic times:

**Develop donor base.** "Having good, strong relationships with your donors becomes even more important in this environment."

**Renegotiate.** "You can find unbelievable bids in the current environment, 25 to 40 percent lower than normal."

**Board giving.** "The best predictor of whether an organization can develop a solid fundraising program is the makeup of its board."

# Scholarships: Not Just a Check in the Mail



Blanca Garcia

Derrick Cozart

“I’m really thankful that I have people out there that I don’t even know who support my education. It means a lot, and it makes me want to keep working hard.”

—Derrick Cozart

Derrick Cozart practices balance – whether managing school and work or mastering a new skateboarding trick. Blanca Garcia, president of the student body, works 50-hour weeks at two different jobs while attending classes online.

Both are among this year’s 1,000 community college students benefiting from nearly \$1 million in scholarships administered by the California Community Foundation. The average award, \$885, goes a long way on a student budget.

Cozart’s \$1,000 scholarship finances his transportation to Santa Monica College. A freshman, he hopes to become a registered nurse by 2010, then work until he has saved enough for a bachelor’s degree.

Garcia, 22, earned an associate’s degree in health sciences and now studies business at Los Angeles Mission College in Sylmar, her hometown. She hopes to someday open a community clinic to address obesity and diabetes.

With the rising costs of college, even a small scholarship can make education a reality for financially needy students. Said Garcia, *“Receiving this scholarship is a sign that I’m meant to succeed.”*

## Invest in the Future with Scholarship Funds

The California Community Foundation, the largest scholarship fund manager in Los Angeles, administers more than 150 scholarship funds worth \$85 million. Last year CCF awarded more than \$3.7 million to 1,700 students.

You can open a scholarship fund with a minimum of \$50,000. When creating a fund, you can:

- Donate different types of assets.
- Designate the size, scope and demographics of the scholarships.
- Benefit from pooled investment management for lower costs and greater return.
- Rely on CCF to manage your fund, making the process easy for you.

To learn more about scholarship funds, contact Chris Salazar, scholarship administrator, at (213) 452-6225 or [csalazar@ccf-la.org](mailto:csalazar@ccf-la.org) or go to <http://calfund.org/receive/scholarships.php>.



The California Community Foundation meets the most rigorous standards in philanthropy and complies with the National Standards of U.S. Community Foundations.

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