



VALLEY  
PHILANTHROPY  
FORUM

*Hiding in Plain Sight*

SAN FERNANDO VALLEY  
SANTA CLARITA VALLEY

*Tuesday December 3, 2013  
Universal City Hilton Hotel*



Edison International  
is proud to sponsor the  
San Fernando Valley Community Foundation's  
Valley Philanthropy Forum 2013.



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Valley Philanthropy Forum

# VALLEY PHILANTHROPY FORUM 2013

## *Hiding in Plain Sight*

*Philanthropy in the San Fernando  
and Santa Clarita Valleys*

Presented by the  
SAN FERNANDO VALLEY  
COMMUNITY FOUNDATION  
In partnership with  
VALLEY NONPROFIT RESOURCES

Tuesday, December 3, 2013 - 7:30 am - 11:15 am  
Universal Hilton, Universal City - Ballroom B

### FOUNDATION SUPPORT PROVIDED BY:

California Community Foundation  
Weingart Foundation  
The California Wellness Foundation

### EVENT CO-SPONSORS

Valley Care Community Consortium  
San Fernando Valley CPA Discussion Group  
National Network of Consultants to  
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## AGENDA

7:30 - 8:00 am Breakfast and Registration

## PLENARY SESSION – BALLROOM B

8:00 - 8:15 Welcome & Conference Goals

David W. Fleming, Esq.

Robert L. Scott, Esq.,

Thomas E. Backer, PhD

8:15 - 8:30 Opening Keynote Talk - George Stanfield, Bank of the West

8:30 - 9:00 A Donor Wants to Support Children's Services

*Philanthropic Case Study*

Jilliene Taper Schenkel, Donor

Joan Maltese, PhD, Child Development Institute

Karina Favela-Barreras, Youth Policy Institute

Moderator - Jan Kern, Los Angeles Children's Trust/Southern California Grantmakers

# AGENDA

9:00 -10:30 Breakout Sessions

## A – ADVISORS SESSION – BALLROOM B

*How Advisors Would Help This Donor*

Trust & Estate Attorneys - Jane Peebles, Karlin & Peebles

Accountants - Bill Downs, CPA, Cyber CPA

Bankers and Wealth Managers - Joe Lumarda, Capital Guardian Trust Company

Philanthropic Advisors - Cristina Gallegos, Janis Minton Consulting

Moderator - Thomas E. Backer, PhD

## B – CIVIC ENGAGEMENT SESSION – HIRO ROOM

*Civic Engagement - Civic and Social Entrepreneurs*

*Leadership Working Outside the Box*

*Investing Time and Talent in the Community*

Ron Schultz - Social Entrepreneurship - the “Good Work”

Richard Katz - Regional Resources & Governmental Relations

Peter Bellas - Economic Development - Cultivating the Local and Regional Economy

Martin Cooper - Community Relations as a Tool - Leveraging and Outreach

Lee Andrews - CrowdFunding Strategies and the New Micro-Philanthropy

Robert L. Scott - Capacity Building - Impact Funds and Local Equity - Valley Mobility Matrix

## REPORT BACK AND CONFERENCE WRAP-UP

10:30 – 11:00 Report Back from Breakout Sessions

11:00 - 11:15 Conference Wrap-Up

*Valley Community Foundation - Next Steps*

Thomas E. Backer, PhD

Peter McCarty

Robert Scott, Esq.



# SPEAKER BIOGRAPHICAL PROFILES

## Valley Philanthropy Forum

**LEE ANDREWS** is Vice President of Business Development for When You Wish, a crowdfunding platform for social and personal causes that has raised hundreds of thousands of dollars for such organizations as the Whole Planet Foundation and USC's Al Mann Institute. He is also a notable crowdfunding expert and founder of The Crowdfunding Formula, a company dedicated to helping educate and mentor people through the crowdfunding process. He can be followed on his blog or twitter where he's documented his experiences crowdfunding with Jane Goodall, Dell, Mike Tyson, AMI at USC, and many others. Andrews lives in Los Angeles and is an MBA candidate at Loyola Marymount University.

**THOMAS E. BACKER, PHD** is Executive Director of Valley Nonprofit Resources, which provides information and services to build the capacity of the more than 4,500 nonprofits in the San Fernando Valley region of Los Angeles. Also a licensed psychologist, Dr. Backer is President, Human Interaction Research Institute and Associate Clinical Professor of Medical Psychology at UCLA Medical School. In 2003-4 he was Senior Fellow at the UCLA Luskin School of Public Affairs, and he has written many books and articles about innovation and change in the nonprofit sector. He also has studied and written about philanthropy, including a national study for the William & Flora Hewlett Foundation of donor advisors and how they work with high-net-worth clients.

**PETER BELLAS** is Dean of Economic Development Division at College of the Canyons in Santa Clarita. This division focuses on assisting business and industry through workforce development, business and technology assistance and job development. Mr. Bellas has served varied roles in the community college system for the last twelve years and has served on several statewide and national boards. Prior to joining College of the Canyons Mr. Bellas worked 25 years in industry with broad experience in management, engineering, manufacturing, Six Sigma and ISO certifications, software development, finance and banking, commercial and military aviation.

**MARTIN COOPER** is President of Cooper Communications, Inc., which was founded in 1982, and provides marketing, strategic planning, public relations, community outreach, and related communications services to a broad range of corporate, governmental, healthcare, and nonprofit clients. Cooper's last book, North of Mulholland, is a collection of his essays from the San Fernando Valley Business Journal. His next book, on crisis management, will be published next month, and he has just signed a contract with the Los Angeles Public Library to write a history of the Valley from 1946 to 1970. Cooper believes in an approach to philanthropy that includes work, wisdom and wealth, having served on more than 20 nonprofit boards, often as president or chairman. His current organizational involvements include: Past President and current Commissioner of the Los Angeles Quality and Productivity Commission; Past Chairman of VICA and currently Chairman of its Board of Governors and of the VICA Research Foundation; Member of the Board of Governors of the Valley Economic Alliance; Founding President and member of the Board of Governors of the Jewish Home for the Aging; Vice Chair of the Boys & Girls

Club of the West Valley; Member of the Director's Council of UCLA's William Andrews Clark Library; Member of the Academy of Motion Picture Arts and Sciences; Honorary Fellow of the Harry Truman Library; Co-chair of the Los Angeles Public Library Valley Times Project Advisory Council. This year he was a Fernando Award Finalist and has received numerous awards for his civic, community and philanthropic activities.

**WILLIAM DOWNS, CPA** is Principal of CyberCPA, and is a Certified Public Accountant in the San Fernando Valley. He focuses on estate and trust work, including estate taxes, fiduciary income taxes, and fiduciary accounting. He also has developed an easily-accessible version of the California Uniform Principal and Income Act with a descriptive table of contents, and with links to the National UPIA, which in turn is annotated with comments and examples.

**KARINA FAVELA-BARRERAS** is Director of Los Angeles Promise Neighborhood Valley Operations at the Youth Policy Institute. The Promise Neighborhoods Initiative is President Obama's signature education and poverty program to transform schools and communities; YPI is the lead agency for Los Angeles Promise Neighborhood and was awarded a \$30 million grant by the U.S. Department of Education in December 2012.

**CRISTINA GALLEGOS** is Director of Operations for Janis Minton Consulting. She is responsible for creating grant systems, conducting due diligence, and providing strategic direction for clients making philanthropic investments. Her programmatic work is balanced and complemented by her financial and IT management capabilities. Prior to joining JMC in 2000, she was Program Officer for The Silton-Sturner Family Foundation, managing a portfolio of grants in cancer research, technology education, fine arts, and economic empowerment for women in disadvantaged countries. Ms. Gallegos blends a strong business background focused on strategy and economics with a commitment to social issues, such as access to arts and education, services for underserved women and children, reproductive rights, and the environment. She currently serves on the Advisory Board of The Blue Heron Foundation, a Los Angeles-based organization with a focus on improving the quality of life for Romania's abandoned children. In the 1990s, she developed and implemented four complex information technology systems for DHL Worldwide Network Europe and Africa, which were subsequently deployed to 22 countries. She moved to the United States from Romania in November 1999.

**RICHARD KATZ** is the owner of a successful public policy and government relations firm based in Los Angeles, Katz-Mitchell Consulting, offering a wide variety of services, including strategic advice, message development, negotiations/mediation and government relations strategies. Katz was first elected to the California State Assembly in 1980 and as Democratic Leader in 1995. He served continuously for 16 years until being termed-out. For 10 years, Katz served as Chair of the powerful Assembly Transportation Committee, where he authored Proposition 111, a 10-year Transportation Blueprint passed by the voters. In addition to serving as Chair of the Transportation Committee, Katz worked in policy areas including education, environment, criminal justice and consumer issues. Katz was California's lead negotiator for the landmark Colorado River Agreement between the State of California, the Federal Government, four California Water Agencies, and the six Colorado River Basin States, furthering his expertise as a negotiator on issues of statewide significance. Katz was appointed to serve with Mayor Villaraigosa on the Governing Board of the Metropolitan Transportation Authority.

**JAN KERN** is President of the Los Angeles Trust for Children’s Health, and a consultant to Southern California Grantmakers and senior advisor at HersheyCause. With more than 25 years of experience in the philanthropic and nonprofit sector, she has served in a variety of leadership and management positions. Her expertise includes strategic program development and execution, staff management, team building and relationship development. Ms. Kern currently leads several peer networks for Southern California family foundations. She is a founding board member of several nonprofit organizations and continues to provide leadership on selected boards and community initiatives. The Los Angeles Trust for Children’s Health is a nonprofit organization of educators, health professionals and community members dedicated to improving the health of children in the Los Angeles Unified School District.

**JOE LUMARDA** is Senior Vice President and Investment Counselor for Capital Guardian Trust Company. Prior to joining Capital in 2006, Mr. Lumarda spent 16 years at the California Community Foundation as a program officer, vice president for development, executive vice president and chief operating officer. During that time, he also served as an independent director for Capital Research and Management Company’s Endowment funds, a series of investment portfolios designed exclusively for nonprofit organizations. He previously spent three years in active duty and five years in the reserves with the U.S. Navy as a lieutenant and naval flight officer. He earned an EMBA from Claremont Graduate University and a BA in philosophy from Saint John’s Seminary College. He is a member of the board of Give2Asia and Drucker School and serves as chair of the board of Barnhart School.

**JOAN MALTESE, PHD** is Executive Director, Child Development Institute and also on the faculty of California State University Northridge in the Early Care and Education Graduate Program. A clinical psychologist with more than 35 years of experience working with high-risk children and their families, she co-founded CDI in 1995 and also is a primary developer of CDI’s Early Learning Center, a community-based program. Dr. Maltese consults, trains and develops curriculum and organizational supports for early childhood identification, intervention and service coordination programs.

**JANE PEEBLES** is Partner and co-founder of Karlin & Peebles, LLP. Ranked one of the “Best Lawyers in America” in the specialty of Trusts and Estates for every year since 2007, she has dedicated her practice to estate planning, international tax planning and charitable planning. She is also a nationally recognized lecturer and author on a variety of domestic and international estate and charitable planning matters. After working in Denver in her early career, Ms. Peebles joined the Los Angeles office of Morgan, Lewis & Bockius LLP, a leading U.S. and international law firm, where she worked in the personal law section on domestic and international estate planning matters. In 1992, she moved to Freeman, Freeman & Smiley, becoming a partner there in 1996. Immediately before founding Karlin & Peebles, LLP, she was a partner in the Los Angeles office of Bingham McCutchen.

**JILLIENE TAPER SCHENKEL** is Principal of the Schenkel Consulting Group in Woodland Hills. She serves as a family office director, advising on all aspects of preserving, administering, and increasing the wealth of a family, and as a consultant on philanthropic strategy. She has been Vice President of the S. Mark Taper Foundation, and was previously its Executive Director. Ms. Schenkel served



as Project Manager for United Housing and Community Development Corporation. She has held professional positions in the regional planning field both in Los Angeles and Ventura Counties. She is a frequent speaker and writer on diverse philanthropy topics, particularly those having to do with family roles and the challenges inherent in the transfer of intergenerational wealth. She holds a Masters of Public Administration degree from the University of Southern California.

**RON SCHULTZ** is the founder of Entrepreneurs4Change and co-founder of Waterman Aylsworth, both dedicated to mindfulness-based social innovation and entrepreneurial education. Waterman Aylsworth has recently launched its university-based credential program, The Center for Creative Entrepreneurship, working with social entrepreneurs and non-profits to become better impact investments. Ron is also the author and editor of over 23 books, including the recently published, *Creating Good Work - The World's Leading Social Entrepreneurs Show How to Build a Healthy Economy*, (Palgrave Macmillan, 2013). In February 2014, he will be receiving the Corporate Social Responsibility World Congress' highest individual award for Social Innovation Leadership.

**ROBERT L. SCOTT ESQ.** is the president and CEO of the San Fernando Valley Community Foundation, and director of the Mulholland Institute/CivicCenter Group. He served as founding chair of The Valley Economic Alliance, founding executive director of the San Fernando Valley Council of Governments, chair of the Valley Industry and Commerce Association, United Chambers of Commerce, and Valley Economic Development Center. He is past president of the Los Angeles City Planning Commission and a chief architect of charter reform in the city, including the creation of a system of neighborhood councils and area planning commissions. He was the recipient of the 44th annual Fernando Award for community involvement and public service.

**GEORGE STANFIELD** is Chief Executive for Bank of the West's Southern California Division and has over 35 years of experience in the financial services industry. He joined Bank of the West's predecessor in Albuquerque in 1985 and in 2001 was named head of the Southwest Division. Mr. Stanfield now is based out of the bank's corporate office in Los Angeles and leaves a legacy of deep philanthropic and community ties in the Southwest. He was recently inducted into the University of New Mexico Anderson School of Management Hall of Fame. He is currently a board member with the Library Foundation of Los Angeles and the Central City Association.



# SAN FERNANDO VALLEY COMMUNITY FOUNDATION

## MISSION STATEMENT

The mission of The San Fernando Valley Community Foundation is to promote the general welfare of the communities situated within the greater San Fernando Valley and Santa Clarita Valley areas of Southern California, otherwise defined as County of Los Angeles Service Planning Area 2; by providing leadership, developing and helping to fund initiatives and organizations; by cultivating civic infrastructure; and by promoting citizen participation in civic affairs, related institutions, activities and causes.

## GOALS

Primary long-term goals of the Foundation:

- Build permanent, named component funds established by regional donors for the broad-based charitable benefit of the residents and businesses of the greater San Fernando Valley and Santa Clarita Valley areas of Southern California (SPA-2).
- Cultivate partnerships with and among civic and charitable organizations to promote efficiency, maximize efforts, and leverage resources.
- Fund and implement research and projects designed to improve and coordinate the common civic and governmental responsibilities and services in the San Fernando Valley and Santa Clarita Valley region.
- In addition to fundraising and resource development, foundation activities include providing leadership, management, logistics, incubation, programming and operations, along with the establishment of "Impact Funds" and initiatives.

Strategies and Values:

- Promote Civic Infrastructure and Organizations
- Develop and Redirect Regional Resources for Local Needs
- Cultivate Civic and Social Entrepreneurship
- Exercise Regional Stewardship
- Raise Funds and Attract Grants
- Target "Impact Funds" and Resources for Unmet Needs
- Inform Public Policy, Governance and Community Strategies
- Facilitate Collaboration and Placemaking
- Provide Institutional Advancement

## Board of Directors - Board of Advisors

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Dennis Washburn, Board of Advisors - Former Mayor and Founder, City of Calabasas  
Ron Schultz, Board of Advisors - CEO, Entrepreneurs 4 Change

## VALLEY NONPROFIT RESOURCES

Established in 2007, Valley Nonprofit Resources offers information and services to strengthen the more than 4,500 San Fernando Valley nonprofits. VNR has five service components: (1) a website with a rich set of information resources and linkages; (2) a learning community for Valley nonprofits, offering peer networking and training given throughout the Valley; (3) technical assistance, with needs assessment and consulting services provided by VNR staff or by outside resources; (4) a concierge to handle Valley nonprofits' information and referral needs, either online or by phone; and (5) a community voice to help Valley nonprofits communicate about critical issues, and interact with policymakers through local convenings. VNR is operated collaboratively by the nonprofit Human Interaction Research Institute (which has conducted research and provided technical assistance to the nonprofit sector since 1961), California State University Northridge, and MEND (the largest poverty services agency in the Valley).

[www.valleynonprofitresources.org](http://www.valleynonprofitresources.org)

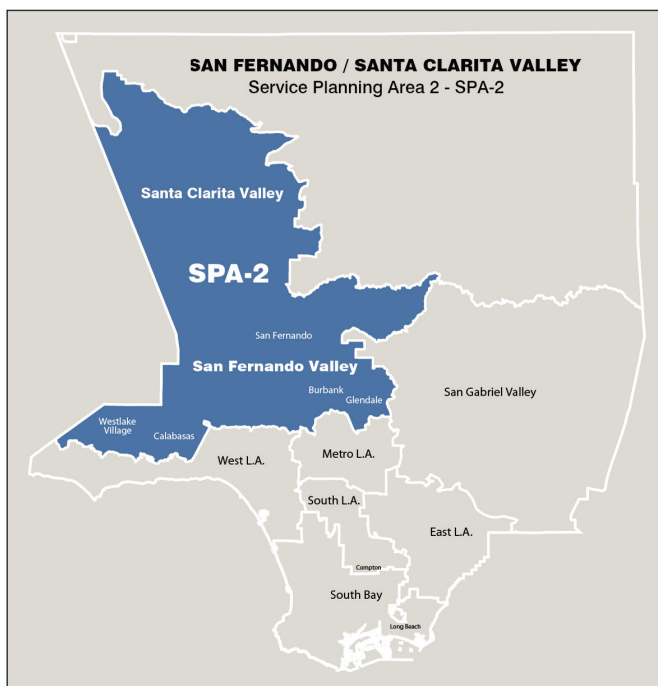
## GEOGRAPHIC EQUITY

The region served by the San Fernando Valley Community Foundation is home to two million residents who are strongly affected by their proximity to the City and County of Los Angeles. Infrastructure and social challenges abound in these suburban/urban communities that have now been over a century in the making. Most of the population lives in the portion of the San Fernando Valley annexed to the City of Los Angeles in 1913—geographically and socially separated from the Los Angeles Basin by the massive Santa Monica Mountain Range.

The San Fernando Valley and Santa Clarita Valley have much in common, comprising the so-called “suburbs” of the City and County of Los Angeles. The two subregions combine to make up the county’s Service Planning Area Two (SPA-2), for which there exists a trove of demographics, civic and social data.

Because much of the regional focus is in the primary centers of government and commerce, the needs of the valley regions in the north tend to be overlooked, even though they are every bit as challenging as many of the highly urbanized areas to the south.

With the maturation of the region comes the need to cultivate a meaningful civic and economic infrastructure suited to such a large and well-identified metropolitan area. Meaningful strategies have to be tailored to the unique aspects of the region to meet the needs, seize upon the opportunities, address social challenges, promote equity, preserve the environment, educate the population, plan the future, address healthcare needs, and inform public policy decisions.





SAN FERNANDO VALLEY COMMUNITY FOUNDATION

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