

CORPORATE PHILANTHROPY & GIVING GUIDE

IN THE FACE OF RECOVERING

from a series of global challenges over the past few years, corporate philanthropy has emerged as having a more critical societal role than ever.

There are many meaningful organizations in the Valley region doing incredibly important work and we have spotlighted a few of them for you here. We also acknowledge some examples of extraordinary businesses that have led by example and taken the process of corporate social responsibility to the next level by making good on their commitments to their nonprofit partners.



CORPORATE CITIZENSHIP & GIVING GUIDE

Addressing Affordable Housing, Homelessness, Small Business and Financial Health

By JACK OLREE

Over the course of the pandemic, Wells Fargo helped address food shortages, public health needs, financial health, small business stability, and housing security for the most vulnerable populations. Now post-pandemic at a local level, we have been allocating resources through expedited grant-making, as well as through relief efforts with national and international organizations, to serve the immediate needs of our communities.

We have stepped up to provide philanthropic investments as we work together to create an equitable economic recovery in Los Angeles County.

Our overall philanthropic strategy is designed to make a greater impact in communities by more effectively combining our financial resources and business expertise.

Wells Fargo focuses on three strategic areas critical for economic advancement: housing affordability, small business growth, and financial health. Through our business and the Wells Fargo Foundation, we use our philanthropic resources, business expertise, ingenuity, and collaborations with public and private sector organizations to fix complex housing issues and address the financial health needs of small businesses.

HOUSING AFFORDABILITY

Wells Fargo's goal is to increase access to stable, affordable places to live – including transitional housing, rentals, and home ownership – and place special emphasis on individuals disproportionately impacted by the housing affordability crisis. Locally, we have been working with several LA organizations, including Hope of the Valley and Housing Authority of Los Angeles.

Hope of the Valley Rescue Mission (HOTV) is one of the largest providers of housing and services for the homeless in California. HOTV operates 16 shelters with over 1,500 beds nightly. They expect to serve more than two million meals this year to the hungry and offer a full complement of rehabilitation programs including intensive case management, mental health services, substance abuse counseling, medical care, life skill training, job placement, and housing navigation.

In 2021, Wells Fargo served as the Site Sponsor for the largest Tiny Home Village in California at that time in Alexandria Park. Helping to build on the momentum, this year, we provided a grant to help fill the funding gap between the daily stipend HOTV gets from the City of Los Angeles for their operating costs and their actual costs. The City of Los Angeles



provides daily stipends for each person, which leaves a significant gap which HOTV must fund from other sources. The 2022 grant from Wells Fargo has almost cut this gap in half and will also encourage other community funders to give to complete the ongoing funding for this and similar housing projects.

Another key aspect of Wells Fargo's support is HOTV's rehabilitation programs to move the homeless to independence and permanent housing is their Job Training and Job Placement Program at their San Fernando Valley Navigation Center. They actively recruit job seekers from their shelters and day laborers and currently have over 1,100 participants.

They provide immigration integration, adult education, legal services, computer literacy, and this year are partnering with Wells Fargo's Region Bank President Robin Choi and his team to assist with resume preparation, and assistance with job interview skills and to offer

financial literacy classes for those who find employment to build a new future of self-sufficiency and purpose.

FINANCIAL HEALTH

With financial health being a key factor in opening pathways to economic development, Wells Fargo continues its work with California State University, Northridge (CSUN), the largest Volunteer Income Tax Assistance (VITA) Clinic in the nation. Wells Fargo provided a multi-year grant in 2022 which was matched dollar-for-dollar by the CSUN foundation that will allow the university to launch an innovative hybrid in-person and virtual platform to scale up cost-free tax preparation services, growing capacity of the Clinic to serve even more low-income taxpayers in Los Angeles County generating more than \$19 million in tax refunds and \$7.5 million in tax credits, while saving the taxpayers over \$3.3 million in tax preparation fees. Taxpayers also received free one-on-one financial coaching services from their certified student financial coaches. Taxpayers are able to develop a customized budget, develop a strategy to pay down debt or save for a new house, college or retirement during these financial coaching sessions.

SMALL BUSINESS GROWTH

The Valley Economic Alliance received a grant from Wells Fargo to grow the capacity of their Business Assistance Program (BAP), which provides free, culturally responsive training, technical assistance, advising, and tools to help diverse small business owners from throughout Los Angeles County access capital, increase revenue, and decrease expenses.

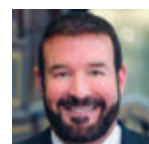
The funds will support one-on-one technical assistance, educational workshops, affinity

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groups and diversity business huddles.

Small business owners are also taught how to do their own revenue projections and separate their personal finances from their business finances. Many small business owners have "bootstrapped" their businesses with their own finances so increased success of their small businesses improves the owners' personal financial health by paying down debt, increasing their personal income, growing cash reserves and savings leading to greater financial health and stability.

As 2022 winds down, our hope at Wells Fargo is that we are creating solutions through our philanthropic efforts to build stronger communities. On behalf of all our employees who serve our San Fernando Valley customers, we thank you for allowing us to be an active part of the community.



Jack Olree is vice president, social impact for Wells Fargo. Learn more at welcome.wf.com/impact.





Give. Grow. Gather together.

Building a stronger community brings out the best in everyone. Together, we can share more, create more change, and do more good for the places we call home.

2022 Corporate Citizenship & Giving Guide leaders, we are proud to celebrate your commitment and service to the community.

wellsfargo.com/donations

**IN THESE
TURBULENT TIMES,**

who do
you trust?

THE FOUNDATION

JEWISH COMMUNITY FOUNDATION
LOS ANGELES

Someone who sees your charitable fund as something other than a source of profits. A reliable partner to help guide you through strategic charitable giving. Someone who understands the charitable implications of the tax laws and can explain them clearly.

Our name tells our story. We're the Jewish Community Foundation of Los Angeles and we exist to better our community. We're managed by people like you. We have over \$1.5 billion of assets and 1400+ donor families. We've been helping our donors create tax effective charitable funds and give more strategically for nearly 70 years.

Talk to someone who has worked with us. Read about the remarkable work our donors are accomplishing with the charitable funds we're helping them create and manage.

**IT'S ADMIRABLE TO GIVE CHARITY.
IT'S MORE EFFECTIVE WHEN YOU ADD TRUSTED GOOD ADVICE.**





FAMED COMEDY PRODUCER TURNS LAUGHTER INTO CHARITY

By Marvin I. Schotland



This is one in a series of articles looking at some of our community's most notable philanthropists and how they are achieving their vision of tikun olam – repairing the world. In each case, these generous people have partnered with the Jewish Community Foundation to facilitate their charitable giving.

During his lifetime, prolific comedy writer and producer Mickey Ross touched the lives of millions of television viewers each week, bringing laughter into their homes. The Emmy-Award-winning Ross, who passed away in 2009 at the age of 89, is associated with some of the most legendary programs of TV's Golden Age, writing 80 episodes of the classic "All in the Family," and going on to produce shows such as "The Jeffersons" and "Three's Company," re-runs of which continue to be broadcast and streamed to this day.



Among many other causes, the Ross Endowment supports Homeboy Industries' vocational training programs for former gang members.

An Endowment to Help Angelenos in Need

Yet it is another legacy altogether through which Ross positively impacts thousands of Angelenos each year and will continue to do so forever. Several years before his passing, he established at the Jewish Community Foundation of Los Angeles the Michael and Irene Ross Endowment Fund which was the beneficiary of about \$10 million from their sizable estate. He also donated 50 percent of all residual payments from his shows, providing an ongoing source of additional contributions to the endowment.

The endowment exists to support Mickey and Irene's desire to provide greater L.A.'s neediest residents with assistance meeting their basic human needs: food, housing, healthcare and education. Since the Ross Endowment began distributing funds in 2011, it has awarded grants of about \$6 million to

causes and programs across the local Jewish and secular communities for those purposes.

Growing Up in Poverty

Mickey's own early childhood influenced the intentions of the Ross Endowment. Born Isadore Rovinsky into a Yiddish-speaking immigrant New York City household in 1919, he grew up in poverty and had vivid memories of the Great Depression. That experience drew him to help people in need – irrespective of their faith – and shaped the kindness and humility that I witnessed up close in my personal interactions with Mickey as he contemplated his legacy late in life.

Not unlike many of the generous philanthropists that I've been privileged to work with, humility best describes Ross. Other adjectives include courageous, as he was a bomber pilot during World War II, and bold, since he cut his comedy teeth working with such legends as Carl Reiner, Sid Caesar, Don Adams and Norman Lear.

Improving Lives Through Grantmaking

Today, those same attributes drive the Ross Endowment's substantial grants each year. At Homeboy Industries, for example, funding from the endowment helps sustain an intensive, 18-month program to assist former gang members in achieving personal, professional and vocational goals. Annual grants to Jewish Family Service's SOVA food pantries ensure that thousands of people each year do not go hungry. Giving to the Los Angeles I Have a Dream Foundation provides long-term support to help youth in under-resourced communities to reach their full potential. And Ross Endowment support helped Bet Tzedek's Holocaust Survivors Justice Network secure millions of dollars in compensation for elderly Holocaust survivors.

Designing Effective Giving Strategies

Referred to The Foundation by his trust-and-estates attorney, Ross and his longtime business manager Mads Bjerre worked with our Center for Designed Philanthropy – which assists individuals and families in developing their charitable goals and fulfilling their philanthropic passions – in formulating the giving strategies that reflected Mickey's vision. Today, the Center team continues to work collaboratively with Bjerre based on a foundation of trust developed over the years of recommending grants that reflect Ross's philanthropic vision.

"Mickey and Irene would feel very good knowing how their endowment is helping people get back on their feet," said Bjerre. "The causes and programs The Foundation is supporting through the Ross Endowment are precisely the kind Mickey and Irene had in mind to fulfill their charitable legacy."

Vital Support for Pandemic Relief

Nothing underscores this more than support from the Ross Endowment during the pandemic. After The Foundation decided to focus all of its 2020 grantmaking on COVID-19 Response Grants, it then invited the Ross Endowment to support the initiative. Bjerre recognized immediately that it would fulfill the Ross's intention to assist L.A.'s neediest citizens. "I know that Mickey would have been proud and grateful to support COVID-19 response and relief," Bjerre stated.

Bjerre continued: "For all his success in entertainment, Mickey remained a modest, low-profile man uninterested in personal publicity or accolades. He lived very modestly especially in relation to his financial resources. He never reconciled himself to the fact that he'd become a wealthy man."

Preserving His Beloved Roots

Instead, it was an inquisitive mind and respect for his roots that fueled a deep affinity for *yiddishkeit* (Jewish life) in the broadest sense. Mickey Ross's own words sum things up best. In a rare interview with the Los Angeles Times, he spoke of his interest in the study of Jewish culture, saying: "I was born of immigrant parents. I love their attitude, their ways, their morals. I don't want to see that lost." Mickey and Irene Ross's charitable legacy are a living testament that they won't be.

Marvin I. Schotland has been president and chief executive officer of the Jewish Community Foundation of Los Angeles (www.jewishfoundationla.org) since 1989. Under his leadership, The Foundation has grown from \$90 million in charitable assets to over \$1.5 billion and awarded nearly \$1 billion in grants over the past decade. Schotland retires at year end.

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION
LOS ANGELES

Advance Your Cause for Good – In the Valleys

The mission of the Community Foundation of the Valleys is to inspire, encourage and facilitate charitable giving for lasting impact on those who live in the San Fernando Valley and Santa Clarita Valley.

A Community Foundation solicits and manages donor advised funds, small family foundations, nonprofit endowments, and business charitable giving funds. In addition, many Community Foundations like Community Foundation of the Valleys (CFV) also have program initiatives.

One of CFV's local initiatives focuses on the challenge of homelessness, and the organization is working on convening effective nonprofits that are working in this space together with leaders from business, education and the faith communities to amplify and expand solutions to issues related to the unhoused. CFV is also in the process of developing initiatives around mental health, and later, around education and disaster relief.

As a small community foundation that is locally funded, CFV has big plans to strengthen its regional impact. It hired an executive director in the fall of 2022 who is working with the organization's board and volunteers to exponentially expand grantmaking, branding, program initiatives and paid staff over the next five years. Since March, 2020, CFV have accomplished the following:

- Raised funds and distributed grants to 20 San Fernando Valley and Santa Clarita Valley nonprofits as part of the 2020 COVID Emergency Relief Campaign.
- Organized a well-received regional

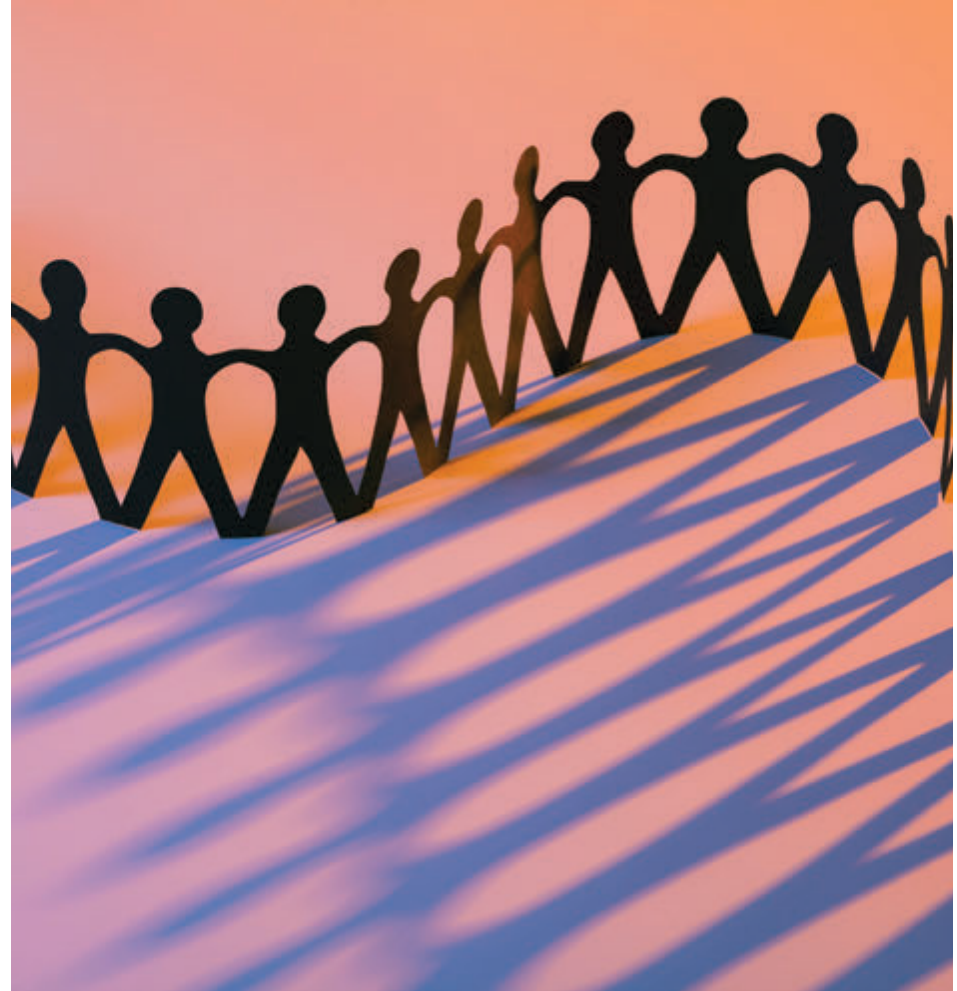
As a small community foundation that is locally funded, Community Foundation of the Valleys has big plans to strengthen its regional impact.

conference, Homelessness and Housing, in December 2021 which was co-hosted with the Valley Economic Alliance.

- Hosted two workshops on the tax benefits of charitable giving which were attended by financial advisors, certified public accountants and nonprofit development professionals.
- Created a five-year strategic plan (2022 through 2027) to guide CFV into the future

Through CFV's financial partner, the California Community Foundation, CFV has access to many financial investment services and can offer fund holders maximum financial benefit simply not available to local donors anywhere else.

For more information, please visit valleygiving.org or contact info@valleygiving.org.



SIX GOOD REASONS TO GIVE LOCAL.



ONE GREAT WAY TO BEGIN. Imagine the joy of giving as a family and creating a tradition that will last for generations. Establishing your own Donor Advised Fund (DAF) with the Community Foundation of the Valleys is easy and provides tax benefits right from the start. The CFV can provide expert advice, and through our partnership with the California Community Foundation (est. 1915), your fund will be professionally managed. Imagine the possibilities – there are hundreds of excellent nonprofits in the San Fernando and Santa Clarita Valleys that fulfill a wide range of causes and services. We invite you to partner with the Community Foundation of the Valleys in making your gifts impactful.

Caring. Compassionate. Committed.



Henry Mayo staff members stand strong in their commitment to take on any challenge and provide top-notch care to our patients.



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Henry Mayo is Hiring!

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CORPORATE CITIZENSHIP & GIVING GUIDE



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@kppanoramacity

Established in 1945

LEADERSHIP

KAISER PERMANENTE PANORAMA CITY
MEDICAL CENTER AREA ADMINISTRATIVE TEAM

Patricia Clausen, RN

Senior Vice President and Area Manager

Stephen De Vita, MD

Area Medical Director and Chief of Staff

Laura Gallardo

Chief Operating Officer

John Chew

Chief Administrative Officer

MISSION STATEMENT

Our mission is to provide high-quality, affordable health care services and to improve the health of our members and the communities we serve.

SERVICE AREA

Los Angeles County; San Fernando and Santa Clarita Valleys:
Canyon Country, Mission Hills, North Hollywood, Panorama City,
Santa Clarita, Sylmar

WHAT WAS YOUR GREATEST RECENT COMMUNITY IMPACT?

We expanded and adjusted hospital, clinic, and virtual care operations of 31 million video and telephone visits, offered testing and treatment of COVID-19 at no cost, participated in the very first vaccine trials and potential therapies to treat COVID-19, spent \$3.6 Billion on Community Health programs and in August 2020, the first class of students at the Kaiser Permanente Bernard J. Tyson School of Medicine safely began.

VOLUNTEER OPPORTUNITIES

We understand that it is often difficult to figure out how to channel your desire to help. That's why we've created this resource to help you find programs in need of volunteers located at community.kp.org/grants-and-volunteering/community-member.

Looking for additional volunteering opportunities year-round? Browse through and connect with one of our partners:

- Big Sunday
- California Volunteers
- HandsOn
- Los Angeles Regional Food Bank
- Community Connect
- San Diego Food Bank
- Second Harvest Food Bank Orange County
- United We Serve
- Volunteer Match

GIVING OPPORTUNITIES

Kaiser Permanente believes that when we collaborate and support each other, our work improves the quality of health and life in our communities. Our social mission is to care for the communities we serve and help them thrive. By offering grants, events, event sponsorship, and community volunteerism, we extend our care, knowledge, and expertise beyond our walls and into the communities. Grants and event sponsorships are offered to nonprofit organizations, government entities, and academic institutions based on current funding priorities and the location of their programs and services.

To learn more please visit kp.org/panoramacity and kp.org/woodlandhills.

GOALS FOR 2023

A fundamental component of that mission is improving access to care. We seek out health inequities, determine how and where we can best use our resources and work with funding partners, educational institutions, and a range of community groups to find solutions, by focusing on these three areas:

- Healthy People: Providing access to high-quality care to low income, underserved people
- Healthy Environments: Creating safe, healthy communities and environments where people live, work, and play
- Sharing Knowledge: Developing important new medical knowledge and sharing it widely



Kaiser Permanente Panorama Medical Center



be INFORMED
Learn more about our efforts.



be INSPIRED
See the power of healthy communities.



be INVOLVED
Turn your inspiration to action.

Investing in Our Community



Kaiser Permanente Awards Millions of Dollars to Community Agencies Mobilizing to Improve Health

At Kaiser Permanente, we understand that good health extends beyond the doctor's office and the hospital. That's why we are committed to improving the health of communities we serve by participating in charitable care and coverage programs to provide care to those most vulnerable.

This year, we awarded over a million dollars alone in Community Benefit grants to support their efforts in the San Fernando Valley, Santa Clarita Valley, and Antelope Valley areas. The grants focused on Access to Health Care, Economic Security, Mental and Behavioral Health, and Healthy Eating Active Living.

2022 Community Health Partners

African American Leadership Organization
Antelope Valley College Foundation
Antelope Valley Domestic Violence Center
Antelope Valley Family YMCA
Antelope Valley Partners in Health
Antelope Valley Union High School District
Bartz-Altadonna Community Health Center
Boys & Girls Club of San Fernando Valley
Boys & Girls Club of Santa Clarita Valley
Boys & Girls Club of the Antelope Valley
Bridge to Home
California State University Northridge Foundation
Carousel Ranch
CASA of Los Angeles
Center for Living and Learning
Child & Family Center
Chrysalis
College of the Canyons Foundation
Comprehensive Community Health Center
East Valley Family YMCA
Eisner Pediatrics
El Nido Family Centers
Eviction Defense Network

Food Finders
Food Forward
Hathaway-Sycamores Child & Family Services
Haven Hills
Homes4Families
Hope of the Valley Rescue Mission
Kids Community Dental Clinic
LA Family Housing
Lancaster School District
Meet Each Need with Dignity
Mental Health America of Los Angeles
Mid Valley Family YMCA
National Alliance on Mental Illness - San Fernando Valley
Neighborhood Housing Services of Los Angeles County
Neighborhood Legal Services of Los Angeles County
New Directions for Youth
North Valley Caring Services
Northeast Valley Health Corporation
ONEGeneration
Palmdale School District
Penny Lane Centers

People Assisting the Homeless
Planned Parenthood Los Angeles
Project Angel Food
Samuel Dixon Family Health Center
San Fernando Community Health Center
San Fernando Valley Community Mental Health Center
Saugus Union School District
Students Run Los Angeles
Tarzana Treatment Centers
The Catalyst Foundation
The Center Professional Counseling
The Children's Center of Antelope Valley
The People Concern
The Village Family Services
Tierra del Sol Foundation
Valley Community Healthcare
Valley Family Center
Vision Y Compromiso
Wesley Health Centers
West Valley Family YMCA

Learn more by visiting about.kaiserpermanente.org/community-health.

CORPORATE CITIZENSHIP & GIVING GUIDE



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 jjarrard@vchcare.org
 vchcare.org
 Established in 1970

LEADERSHIP

EXECUTIVE LEADERSHIP

Paula Wilson
 President & CEO

BOARD OF GOVERNORS 2022-2023

Chair: Linda Bessin*
 Community Activist

Secretary: Kim Pretti*
 Owner, KimProp Stylist

Vice Chair: Joey Kragelund
 Senior Vice President, HKS
 Architects

At-Large: Elissa Miller*
 Partner, Sulmeyer/Kupetz

Treasurer: Victor Berrellez
 Vice President, US Bank

At-Large: Carolyn Hoff
 Associate General Counsel,
 Edmunds.com, Inc.

MISSION STATEMENT

The mission of Valley Community Healthcare is to improve the health and wellbeing of our community by providing high-quality comprehensive healthcare services. Regardless of ability to pay.

SERVICE AREA

San Fernando Valley and environs

FAST FACTS

Valley Community Healthcare offers primary care, dental, behavioral health, optometry, women’s health, specialty care and more to over 25,000 men, women and families each year. Its two clinic locations in the San Fernando Valley ensures our neighbors struggling with low income, homelessness and declining health can escape the downward spiral of poverty and feel empowered to take charge of their health.

FUNDRAISING EVENTS

- Coming Fall 2023!

MEMBERS

Alexandra Chernyak, CPA
 Partner, Miller, Kaplan & Arase, LLP

Francesco Federico
 Regional Medical Director, HealthNet

Andrew Kratzer
 Political/Comm Manager, Afriat Consulting Group

Debra Miller*
 Entertainment Production

Tami Perkins*
 Caterer, TamiCooke

VOLUNTEER OPPORTUNITIES

- Women4Women & Children: Advocacy & fundraising group supporting equitable health care access for women and children
- Reading books to our pediatric patients
- Contact James Jarrard, Development Director for volunteer opportunities!

GIVING OPPORTUNITIES

- Corporate Partnership
- Event Sponsorships
- All individual giving
- Donate online now at vchcare.org/impact

GOALS FOR 2023

- Expand our Teaching and Education program that immerses new medical students in community health and develops a mission-driven workforce
- Expand integrated behavioral health, auxiliary and specialty care services to provide a holistic approach to primary care for our patients with high need

Mark Phillips, Esq.
 Shareholder, Lewitt Hackman

Byrdie Pompan
 President/CEO, Clear Health Advisors

Pamela Richardson*
 Owner, Dog Training by Pam

Mike Rudow
 Wealth Advisor, Morton Wealth

*Directors

Comprehensive care. All under one roof.

When you donate to Valley Community Healthcare, you invest in the health and wellbeing of our vulnerable neighbors in need of integrated health care services.

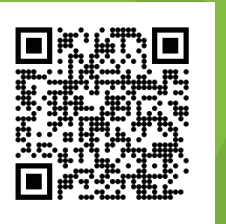
2022 Corporate Partners:

- Afriat Consulting Group • Aloxxi International
 Amazon • American Business Bank • Cathay Bank
 Claudine: Artisan Kitchen & Bakeshop
 Rickey Gelb, The Gelb Group • Keyes Automotive
 Marsh & McLennan Agency • Millenium Dance Complex
 Paul Davis Insurance Services
 San Fernando Valley Business Journal • SoCalGas



GIVE THE GIFT OF INTEGRATED CARE.

Join our corporate partners committed to improving the lives of individuals and families in the San Fernando Valley—scan the QR code now to put health care into the hands of those who need it most.



Valley Community Healthcare
 Make an impact today at vchcare.org/impact