As we all continued to face societal and health challenges on a global level over the last year and a half, corporate philanthropy has emerged as having a more important overall role than ever.

There are many important and 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.
Thanking Our San Fernando Valley Nonprofit Community

By JACK OLREE

As we look towards the holiday season and the hope it brings for the future, I am grateful to the many nonprofits who have cared for our community during the incredible challenges of the past two years. As an essential industry, it was vital for Wells Fargo to continue providing financial services across the San Fernando Valley and to support critical relief for our county’s most vulnerable communities. From providing families with rental assistance, to helping our small businesses continue their operations, to offering meals for our communities, our nonprofits have been at the heart of the region’s pandemic relief and recovery efforts.

In 2020, Wells Fargo donated more than $9 million to bolster COVID-19 relief efforts in Los Angeles County. This year, we have matched this and continued to support organizations supporting our communities’ economic recovery and growth.

Our approach to supporting the community is designed to make a greater impact by deploying not only our financial resources but also our business expertise. Wells Fargo works with public and private sector organizations to help solve complex housing, small business, financial health, and environmental sustainability needs.

HOUSING AFFORDABILITY

The United States has a shortage of affordable housing for its low- and moderate-income residents, and high housing costs have only exacerbated growing economic inequality. 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.

LA Family Housing and Homes 4 Families (H4F) are two San Fernando Valley-based nonprofit organizations helping address this growing need. With a substantial grant from Wells Fargo, Homes 4 Families is developing a new 56 unit transitional housing development in Palmdale that will pave a path to financial stability and success for its low-income residents. The organization also has a commitment to environmental sustainability with GRID Alternatives installed solar panels at each of the 56 veteran homes, supporting our commitment to environmental sustainability and providing cost savings to each family.

LA Family Housing (LAFH) helps individuals and families transition out of homelessness and poverty, typically serving up to 500 families a night in its interim housing, which includes motels and single-family homes. Food insecurity is always prevalent for the families they serve, and with a grant from Wells Fargo in 2020, LAFH purchased daily hot meals for four weeks for each family member living in its motels and other transitional sites. Wells Fargo also supported the launch of LAFH’s new app, AROYO.

AROYO stands for A Room Of Your Own and helps match formerly unhoused adults with compatible housemates in shared housing, which can help individuals move into housing more quickly and have a less isolating experience.

FINANCIAL HEALTH

Wells Fargo aims to improve the financial health of low- to moderate-income individuals and families by expanding access to financial health tools and coaching that can empower millions who are struggling to save money, reduce debt, and rebuild financial stability.

For the past five years, we have collaborated with CSUN’s VITA Clinic, serving several thousands low-income residents of the San Fernando Valley with free tax preparation services, saving over $1.2 million of tax preparation fees each year. Wells Fargo is also a founding supporter of the CSUN VITA Financial Coaching Program, where financial coaches work closely with low-income taxpayers over several months to help them save part of their refund. These individualized services have enabled many taxpayers to be in a position to acquire their first home, send their kids to college, or begin saving for retirement. The CSUN VITA Clinic also offers education programs, career counseling opportunities, training for small businesses, and individualized learning and career skills that help propel them onto a strong career trajectory.

SMALL BUSINESS GROWTH

Small businesses are an important driving force in job creation and thriving communities. Wells Fargo continues to intensify its efforts to provide entrepreneurs with technical assistance and increased access to affordable sources of capital and training so they can grow, build assets, and create local jobs. Examples of Wells Fargo’s commitment to supporting the small business community include The Valley Economic Alliance (VEA) and their “Valley Main Streets” place-based revitalization project. The project includes development of a Commercial Cluster Toolkit, which can be used by community leaders as a self-directed guide for revitalization in their respective commercial districts, and a Demonstration Project, where the toolkit will be implemented as a pilot project called Uplift Lake View Terrace, generating positive impact for the Lake View Terrace community.

In July 2020, Wells Fargo launched the Open for Business Fund by donating all fees generated through our participation in the first round of the PPI. Through the end of last year, the Open for Business Fund has deployed more than $84 million in philanthropic capital to CDFIs— including several in Los Angeles – helping an estimated 16,000 small business owners, and preserving 50,000 small business jobs across the country.

I am truly grateful to all the nonprofit organizations who have come to the aid of individuals, families and small businesses during these incredibly challenging times. As we go into the holiday season, I want to sincerely thank our employees, customers, and nonprofits for the team effort in helping us make a difference and build stronger communities in the San Fernando Valley.

Jack Olree is Vice President, Social Impact and Sustainability with Wells Fargo Bank overseeing the San Fernando Valley. News, insights and perspectives from Wells Fargo are also available at stories.wf.com.
Every effort inspires change

Taking the time to meet needs requires commitment and vision. Your continual service and devoted vision helps move our local communities toward growth and sustainability.

Thank you for your service in the places where we live and work.

wellsfargo.com/donations

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At Kaiser Permanente, we recognize that where we live and how we live has a big impact on our health and well-being. Our work is driven by our mission: to provide high-quality, affordable health care services and to improve the health of our members and our communities. It’s also driven by our heritage of prevention and health promotion, and by our conviction that good health is a fundamental right.

COMMUNITY INVESTMENT

We are committed to improving the health of our communities. We do that by ensuring health access, improving community conditions for health and equity, and advancing the future of community health through innovation. We also share our financial resources, research, nurses and physicians, and our clinical practices and knowledge through a variety of grantmaking and investment efforts.

Good health extends beyond the doctor’s office and the hospital. It begins with healthy environments: fresh fruits and vegetables in neighborhood stores, successful schools, clean air, accessible parks, and safe playgrounds. Each community in which we operate has unique needs, stories, and opportunities to advance health and health equity. We provided funding to enable communities to respond to specific local needs, such as expanding testing, enhancing coordination with local public health departments, reaching out to the homeless, and building capacity for community-based health care providers. We award grants to safety net organizations supporting people with low incomes and who are uninsured with access to high-quality telehealth services.

IMPACTING THE FUTURE OF HEALTH CARE

In 2020, Kaiser Permanente marked the 75th anniversary of our founding as a nonprofit integrated health care provider. Our highest priorities continued to be our commitment to providing high-quality, affordable care to our members, patients, and communities equitably and safely, while protecting our health care workers from harm.

We expanded and adjusted hospital, clinic, and virtual care operations of 11 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.

Michael Downer is a communications manager at the Kaiser Permanente Panorama City Medical Center. Learn more at kp.org/panoramacity.
Investing in Our Community

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 more than $250,000 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, Workforce Development, Chronic Disease Management, and Healthy Eating Active Living.

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

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2021 Community Health Partners

A Community of Friends
African American Leadership Organization
Alliance for Housing and Healing
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
East Valley Family YMCA
Essex Pediatrics
El Centro de Amistad
El Nido Family Centers
El Proyecto del Barrio
Food Finders
Food Forward
Grace Resources
Hathaway-Sycamores Child & Family Services
Haven Hills
Homes4Families
Hope of the Valley Rescue Mission
International Pre-Diabetes Center
Journey Out
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
Mission City Community Network
National Alliance on Mental Illness - San Fernando Valley
Neighborhood Housing Services of Los Angeles County
New Directions for Youth
New Horizons
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
Santa Clarita Valley Food Pantry
Santa Clarita Valley Senior Center
Saugus Union School District
Singles Mothers Outreach
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 Care Community Consortium
Valley Community Healthcare
Valley Family Center
Vision Y Compromiso
Wesley Health Centers

Learn more by visiting about.kaiserpermanente.org/community-health.
AT THE TIME THEY ARE NEEDED MOST, DONOR-ADVISED FUNDS EMPOWER CHARITABLE GIVING

By Steve Gamer

In the realm of trusts-and-estates attorney Paul Gordon Hoffman, planned charitable giving is every bit as personal as it is professional. A founding member of the nationally recognized Los Angeles law firm Hoffman, Sabbath & Watermaker, APC, Paul routinely advises clients on matters related to charitable planning and how it fits into the scheme of their larger estate plans.

Away from the office, the attorney practices what he counsels clients. For Paul and his wife, Sue, giving back plays a prominent role in their lives, and their donor advised fund (DAF) at the Jewish Community Foundation of Los Angeles (The Foundation) provides the ideal charitable vehicle for doing so.

While the Hoffmans sustain a range of causes of shared importance to them through the DAF they established in 2012, the charitable fund also enables them to respond generously and nimbly in times of crisis, including support in the aftermath of catastrophes such as the Santa Barbara wildfires and Louisiana hurricanes. Most notably, though, it has been their charitable vehicle for doing so.

“The income-tax reforms in 2018 changed the standard deduction and raised numerous questions about its impact on charitable giving. The need for well-planned strategies to maximize the tax benefits of your philanthropy is essential. DAFs offer an ideal vehicle for maximizing the deductibility of your donations, including approaches such as charitable gift “bunching” or via contributions of appreciated assets.

With respect to estate planning, a DAF can be the recipient (upon death) of all or a portion of the donor advisor’s IRA or other retirement plan benefits. The family then controls 100% of those funds for charitable-giving purposes from the DAF. Comparatively, if the heirs take the retirement funds personally, they would be subject to tax in some degree irrespective of whether estate taxes are applicable.

FOR THE GOOD OF COMMUNITY

The only cost associated with a DAF at The Foundation is a modest annual fee which covers several important administrative and portfolio management functions. A portion of that fee is reinvested in The Foundation’s own grantmaking, increasing the impact of your giving, as well as ways to amplify the impact of your giving, please visit www.jewishfoundationla.org or contact us at (323) 761-8704, or development@jewishfoundationla.org.

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About the author: Steve Gamer is vice president of advancement for the Jewish Community Foundation of Los Angeles, which manages more than $1.4 billion in charitable assets and distributed $116 million in grants in 2020 to causes locally, nationally, and around the world. He has 30 years of experience working with individuals, families, corporations, and foundations to help them achieve their philanthropic vision.

STREAMLINE YOUR GIVING

DAFs offer many of the advantages of a private foundation without the costs and administrative complexities of a private foundation.

One of the simplest ways to enhance your philanthropy is by establishing a DAF—essentially a charitable-giving account—at The Foundation. It provides convenience and flexibility for your donations, allowing you to give more strategically. You can fund a DAF with a variety of assets and can recommend grants to your favorite charities, Jewish or secular, on your own schedule. You may select investment options to potentially grow your fund as The Foundation streamlines the entire process by handling all the administrative responsibilities, freeing you to focus on the joy of giving.

The benefits of a donor advised fund at The Foundation include:

• With an initial contribution of at least $5,000 in cash, you can create your own donor advised fund, receive an immediate fair-market-value charitable tax deduction, and have your charitable dollars in one convenient account where you can maintain total privacy about your giving.

• By using appreciated assets such as marketable stocks and bonds, real estate, or interests in a limited liability company to fund your DAF, in addition to the fair-market-value tax deduction, you will avoid all capital gains tax on your gift.

• Additionally, our Center for Designed Giving options providing diversity and potential tax-free growth of your fund’s assets.

• If your fund’s balance is $50,000 or more, you can access several types of investment options providing diversity and potential tax-free growth of your fund’s assets.

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• Finally, DAFs afford the ability to name your children as successor donor advisors, effectively creating the closest equivalent to a private family foundation without the cost and administrative hassles of establishing and maintaining one.

MULTIGENERATIONAL GIVING

Studies indicate that children whose parents actively discuss giving are significantly more likely to become charitable adults themselves than those with parents who do not. This same research shows that charitable families volunteer more and consider themselves happier and closer-knit. That’s why we suggest engaging your family early on to communicate your charitable values and decision-making process.

To encourage their children’s philanthropic values, many Foundation donors have opened DAFs for their children and grandchildren as well, enabling them to experience firsthand the fulfilling power of giving at an early age.

What is our donor advised fund for if not to be used in a once-in-a-lifetime event like the current pandemic?

giving during the global pandemic that has taken on personal importance, as the couple stepped up their contributions for COVID-19-related response and relief efforts.

“What is our donor advised fund for if not to be used in a once-in-a-lifetime event like the pandemic?” Paul asked rhetorically, adding that The Foundation’s online COVID-19 Response Hub provided a source to help them identity vetted causes and programs worthy of support.

He continued: “Our DAF enables us to support a wide range of causes more efficiently and strategically, provides us with a lot of flexibility, and affords us access to The Foundation’s helpful guidance with our giving when we need it, as it has done during the pandemic.”

Why did the Hoffmans, as well as hundreds of others, select Foundation DAFs as the best vehicle to conduct their philanthropy?

You can recommend grants of $100 or more to a nearly limitless range of nonprofit organizations, Jewish or secular, locally, nationally, or in Israel via 24/7 online access to your fund.

Plus, you can review your fund’s balance and giving history and add to your fund anytime with a credit card or online check.

If your fund’s balance is $50,000 or more, you can access several types of investment options providing diversity and tax-free growth of your fund’s assets.

Additionally, our Center for Designed Giving offers complimentary philanthropic consultation and educational programs in giving more strategically. For example, we can help you determine which causes to support based upon your own passions and fields of interest.

Finally, DAFs afford the ability to name your children as successor donor advisors, effectively creating the closest equivalent to a private family foundation without the cost and administrative hassles of establishing and maintaining one.
CHANGE THE WORLD. MINIMIZE TAXES. FEEL ENRICHED.

Who do you trust to help accomplish this?

It's admirable to give charity. It’s more effective when you add trusted good advice.

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION LOS ANGELES

Since 1954 • Over $1 billion of assets • 1300+ donor families

www.jewishfoundationla.org • (323) 761-8704
development@jewishfoundationla.org
MISSION STATEMENT
The Child Care Resource Center (CCRC) cultivates child, family and community well-being.

SERVICE AREA
Northern Los Angeles County and San Bernardino County

FAST FACTS
Percentage of total revenue goes to cause (after operation expenses): 92%

Greatest impact 2021: We addressed urgent, pandemic-related needs of clients while maintaining delivery of existing services. We ensured essential workers had child care and distributed critical items including cleaning products, food, diapers and formula.

FUNDRAISING EVENTS
As we approach the 2021 holidays, our efforts are focused on ensuring that children in our community have an age appropriate book and toy. Parents, child care providers and children are still struggling. We want to make sure that we make the holidays a little brighter for many children that would go without otherwise.

GIVING OPPORTUNITIES
Holiday Book and Toy Drive - Adopt a Family
$25 for a family with 1 child
$50 for a family with 2 children
$75 for a family with 3 children
Each family “adopted” through our holiday event is actively involved in CCRC programs and each child will receive:

• 1 age-appropriate toy
• 1 age-appropriate book
• 1 family board game
• 1 bag of fruits and vegetables
• 1 pack of diapers (if needed)
• 1 bag of personal protective supplies

CCRC spreads holiday cheer to thousands of children.
NOVEMBER 30, 2021

GIVING TUESDAY

Serving over 2,700 members and enabling and empowering them to Great Futures

2021 COMMUNITY IMPACT: As LA Unified School District opened back up the Boys & Girls Club of the West Valley was able to bridge the gap and provide after-school programming focused on social-emotional learning at 11 school sites.

SERVING THE WEST VALLEY
Canoga Park, Chatsworth, Reseda, Tarzana, Woodland Hills

LEARN MORE: WVBGC.ORG/GIVINGTUESDAY

WHY GIVE MONTHLY?
Your monthly gift has a direct and immediate impact and will provide long-term sustainability of our programs. It lets you spread your generous support throughout the year and make an ongoing commitment to the Boys & Girls Club youth.

MONTHLY GIVING CLUB

$15 | $180 per year
Helps sponsor healthy snacks and meals for future “SUPERHEROES”

$25 | $300 per year
Helps sponsor field trips and builds interest in exploring new horizons

$35 | $420 per year
Helps sponsor annual membership for a child ensuring they have access to a safe place with life-changing programs each day after school and during school breaks

$55 | $660 per year
Helps sponsor the next great success story for any youth in need

Email: THECLUB@WVBGC.ORG

Boys & Girls Club of the West Valley
7245 Remmet Avenue
Canoga Park, California 91303

818-610-1054

FRIEND OF YOUTH

$10 | $120 per year
Helps sponsor year round educational, social, and recreational activities with caring mentors and volunteers

HERO FOR YOUTH

LIFE CHANGER FOR YOUTH

$35 | $420 per year
Helps sponsor annual membership for a child ensuring they have access to a safe place with life-changing programs each day after school and during school breaks

CHAMPION FOR YOUTH

$55 | $660 per year
Helps sponsor the next great success story for any youth in need

OTHER

You Pick The Amount

Any gift no matter what size makes a difference today, tomorrow and for the future
MISSION STATEMENT
The mission of Valley Community Healthcare is to have a positive impact on the health and wellbeing of the whole community by providing high quality primary medical care and comprehensive healthcare services to those in need, regardless of their ability to pay.

SERVICE AREA
San Fernando Valley and environs

FAST FACTS
Percentage of total revenue goes to cause (after operation expenses): 82%
Greatest impact 2021: Bringing people back on site for desperately needed in-person visits.

VOLUNTEER OPPORTUNITIES
Event project help

GIVING OPPORTUNITIES
• Corporate Partnership
• Event Sponsorship
• All individual giving
• Online giving/ via Facebook or vchcares.org

GOALS FOR 2022
• Stabilization after COVID
• Infrastructure expansion
Charitable Giving is Needed More than Ever

The share of Americans donating to charity fell from two-thirds in 2000 to half in 2018, according to a study released earlier this year by the Indiana University Lilly Family School of Philanthropy at IUPUI. Just 49.6% of U.S. households made a charitable contribution in 2018, the latest year for which comprehensive data is available. That is a drop of almost 17 percentage points from 2000, when 66.2% of American households gave charitable donations, the study finds. The report, “The Giving Environment: Understanding Pre-Pandemic Trends in Charitable Giving,” examines giving patterns during that timeframe using data from five nationally representative longitudinal studies. It finds a consistent decline in giving participation across those datasets and provides new insights into the decline. The report is based on research funded by the Bill & Melinda Gates Foundation.

“We’ve seen a downward trend in households’ participation in giving since the Great Recession, but this is the first time that only half of U.S. households donated to charity,” said Una Osili, Ph.D., associate dean for research and international programs at the school. “This new research offers clear evidence of a substantial decline in formal charitable giving rates prior to the unprecedented events and challenges of 2020. It is also important to acknowledge the many additional ways individuals are participating in philanthropy today, including newer means such as crowdfunding and impact investing, and more traditional ways, such as in-kind giving and mutual aid.”

Data is not yet available to show whether the decline in participation continued in 2020. In order to fully understand the impact of the pandemic, the social justice movement and other developments of last year, it’s important to understand what the charitable giving landscape was like in the years leading up to 2020, and the new study provides that perspective, researchers said. The study primarily analyzes the latest data from the Lilly Family School of Philanthropy’s Philanthropy Panel Study (PPS), a module of the University of Michigan’s Panel Study of Income Dynamics. As a nationally representative longitudinal study, the PPS follows 9,000+ households over time and provides the most comprehensive data available on giving trends by U.S. households. Fact sheets on findings from the new PPS data, about household giving in 2018, are being released along with the new report.

Both Secular and Religious Giving Participation Declined, but at Different Rates

The study shows that the percentage of U.S. households that donate to religious causes declined at a slower rate than the decline in the percentage of households giving to religious causes. After hovering between 55% and 57% from 2000 to 2008, the share of households donating to secular causes dropped from 52% in 2010 to a new low of 42% in 2018.

Changing Philanthropic Landscape

“The philanthropic environment continues to evolve rapidly, with a wide variety of changes driven by factors such as innovations, technology, donors’ preferences and nonprofit practices,” Osili said. “The COVID-19 pandemic, increased awareness of racial and social justice issues, and the economic crises in 2020 likely shifted aspects of the philanthropic landscape, as well.”

The new study is part of the Lilly Family School of Philanthropy’s ongoing research designed to increase understanding of changes occurring in the charitable giving environment. Upcoming research from the school will delve further into potential explanations for the decline in charitable giving participation. Better understanding of the factors influencing donors’ decisions making, especially among diverse and newer donors, can help identify ways to expand and improve the giving experience for both donors and charities, Osili said.

The Indiana University Lilly Family School of Philanthropy at IUPUI is dedicated to improving philanthropy to improve the world by training and empowering students and professionals to be innovators and leaders who create positive and lasting change. Learn more at philanthropy.iupui.edu.