

California State University, Fullerton

THE FIRST **10** **YEARS**

Gianneschi Center for Nonprofit Research

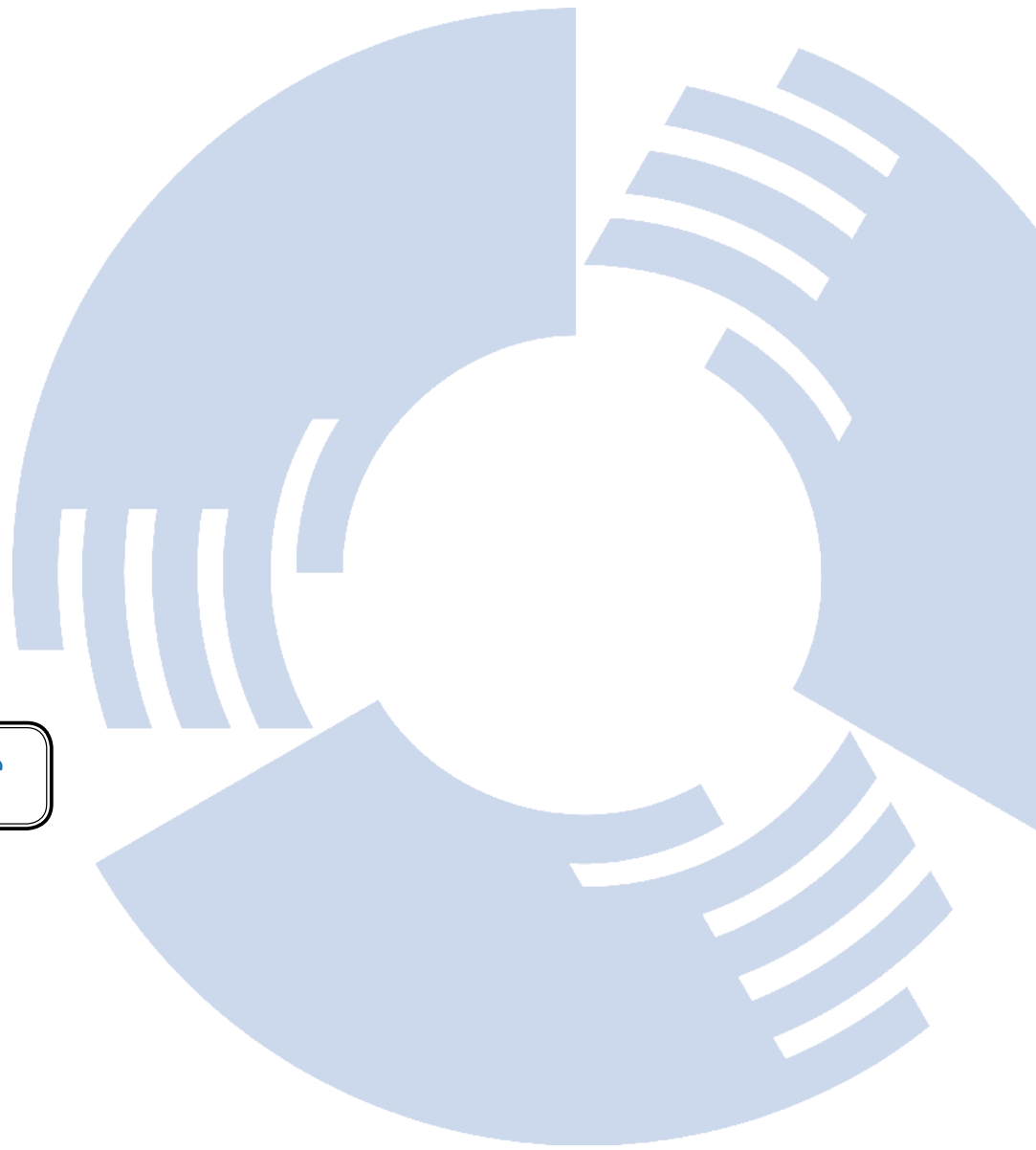


Cal State **Fullerton**

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Nonprofit organizations are all around us, yet the public knows little about them. People interact with nonprofits in many ways—whether as donors, volunteers, employees, clients, vendors, or advocates—and yet, even those who are the most familiar with them may not appreciate the special position that nonprofits enjoy in our society, or why. The nonprofit form is intensely varied—supporting institutions as diverse as clubs, hospitals, art centers, schools and universities, centers of worship, environmental protection groups, benevolent societies, chambers of commerce, foundations, and affiliation groups around a constellation of issues and causes.

Cal State Fullerton recognized the need for data about this vibrant and complex sector in 1995 by commissioning the first formal study of Orange County's nonprofit organizations, and ensuring that this groundbreaking research would continue by establishing the Center for Nonprofit Sector Research in 1996.

In its first ten years, the Center has published reports and research papers by, for, and about Orange County's and Southern California's nonprofit organizations. While documenting their scope and characteristics, the Center also has fostered a variety of programs designed to strengthen the sector. Key among these are programs that expose students to the sector and encourage them to pursue careers and service in nonprofit fields. The Center has been a catalyst in forming

- the first affinity chapter of the CSUF Alumni Association: the Nonprofit Professionals Alumni Association – NPAA,
- the annual \$1,000 NPAA Scholarship for students pursuing nonprofit careers,
- the “Public Service and Nonprofit Leadership Certificate” in the Student Leadership Institute,
- the “Financial Planning and Management for Nonprofit Organizations” certificate in University Extended Education,
- CSUF’s “American Humanics” certificate program,
- the “NonprofitConnections” website for students, faculty, agencies and the public,
- and most recently, the Nonprofit CFO Network.

The Gianneschi Center for Nonprofit Research serves the University and strengthens the nonprofit sector through its blend of research, outreach, training and networking programs.

This timeline of the Center's first ten years documents some of the highlights of our activities to date. None of these accomplishments would have been possible without the leadership, support and involvement of the many advisors, donors, alumni, nonprofit leaders and associates named in this report. Thank you for our first decade, and please join us for the next 10 years.

Kathleen Costello MA, Director



The Center's original home was in CSUF's University Advancement division, under the auspices of Vice President for University Advancement, Dr. Harry R. Gianneschi. On his retirement in 2001, the University honored his many contributions and accomplishments by naming the Center for him.



RESEARCH FINDINGS The first formal documentation of Orange County's nonprofit sector reports that as of 1994-95, there were 1,448 financially active nonprofits in Orange County. They reported revenues of \$3.14 billion. While large organizations (>\$500K revenues) were just 26 percent of all reporting nonprofits, they claimed 95 percent of total revenues.

1994

The need for data about Orange County's nonprofit sector emerges when the County of Orange declares bankruptcy and the interim CEO forms a kitchen cabinet to inform him of how the bankruptcy's repercussions impact nonprofits. No one knows how many nonprofits there are in Orange County, how big they are, or what their share of the local economy is. Estimates range from 200 to 8,000 agencies. Among other responses, a pool of donors creates an emergency loan fund to ensure that service delivery isn't interrupted by the county's inability to make timely payments on service contracts or pass-through funds from federal or state agencies.

1995

CSUF University Advancement convenes a series of focus groups with nonprofit leaders and funders to explore research needs and support for research about the nonprofit sector.

With interest and support from the community, CSUF University Advancement commissions the Institute for Economic & Environmental Studies to conduct the first formal study of Orange County's nonprofit sector.

1996

Interest in the study and demand for ongoing research leads CSUF to establish the **Center for Nonprofit Sector Research**.

CNSR and IEES release "**The Nonprofit Sector in Orange County: The First Report**" at a research forum. It is the first formal report to document the size, scope and economic characteristics of the county's nonprofit sector.

CNSR and University Extended Education convene an advisory board to establish a **certificate program in fund accounting and nonprofit financial management** – topics that typically are not taught in accounting degree programs and are too complex for informal workshops, yet are universally needed by nonprofits.

1997

CNSR organizes the “**Nonprofit Hall of Fame**” exhibition in the Titan Student Union over the summer to honor over 100 CSUF alumni in leadership positions of nonprofit organizations.

1998

CNSR sponsors the annual conference of the Orange County **Association of Fundraising Professionals** in the Titan Student Union, attended by nearly 300 nonprofit professionals.

CNSR develops the **Orange County Nonprofit Master Database** as a service to nonprofit associations and others communicating with local organizations, and as a revenue-generating strategy for the center’s ongoing operations.



**1999**

University Extended Education launches the “**Certificate in Financial Planning and Management for Nonprofit Organizations**” in spring 1999 with support from Rossi O’Brien & Company LLP and Experian. Over 100 students enroll in the first three semesters the program is offered.

CNSR director Kathleen Costello completes a three-week Fellowship at the Urban Institute’s National Center for Charitable Statistics in Washington, D.C., supported by a CSUF Staff Training & Development grant for professional development.

A blue ribbon committee establishes the first industry chapter of the CSUF Alumni Association, the **Nonprofit Professionals Alumni Association**.

NPAA establishes the “**Certificate in Nonprofit Leadership**” in the Student Leadership Institute, along with a mentorship program and a scholarship fund.

CNSR proposes that CSUF develop an undergraduate certificate in nonprofit leadership under the auspices of the national program, “American Humanics.” Student Affairs accepts the program, and CNSR works with Student Affairs to recruit nonprofit leaders for the campus-community advisory council.

CNSR produces a new report, **“The Nonprofit Sector in Orange County: 1997 Economic Scope and Characteristics.”**

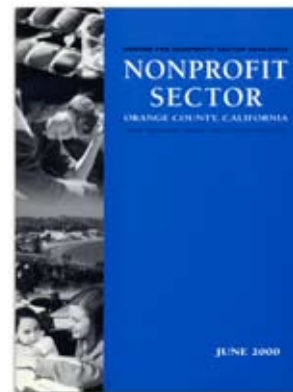
CNSR convenes a variety of key informants in a series of focus group meetings to explore the state of philanthropy in Orange County and the report’s findings. Their responses, and highlights of the report, are presented at the **“State of Philanthropy”** town hall meeting and panel discussion. The **“State of Philanthropy”** town hall report is published online.

CSUF’s Social Science Research Center, Center for Demographic Research, and Center for Nonprofit Sector Research represent the campus in a county-wide effort to develop a mapping tool, the **“Health and Human Services Mapping System.”**

Dr. John Carroll (Geography) receives a **\$500 GCNR Research Stipend** to present “Mapping Communities: Reporting on the Creation of a Geographic Information System for Health and Human Services in Orange County (CA)” with co-author Kathleen Costello at the 2000 Annual Meeting of the Association for Research on Nonprofit Organizations and Voluntary Action in New Orleans.

The **“Certificate in Financial Planning and Management for Nonprofit Organizations”** continues in spring 2000 with support from Grant Thornton.

2000



RESEARCH FINDINGS As of 1997, there were 1,434 financially active nonprofits in Orange County. They reported gross receipts of \$4.2 billion. Employment in the charitable sector was about 2.4 percent of all payroll expenses reported in the county (comparable to the insurance, real estate, and electronic components industries).



Sponsors of the State of Philanthropy 2000



NPAA hosts a mixer and panel discussion, “**Philanthropy in 2001**,” at the annual meeting for alumni and nonprofit leaders. Alumni (from left) Robert Grant '66, Lisa Fujimoto '84, and Ron Davis '69 speak about how nonprofits and philanthropy have shaped their personal and professional lives.



Stephanie Lomibao is pictured here (front) with NPAA board members (back row, from left) Gail Taylor '77, Catherine Spear '81, and Kim Bailey '98/'03.

2001

Cal State Fullerton renames CNSR the **Gianneschi Center for Nonprofit Research** in honor of retiring Vice President of University Advancement and founder of the center, Dr. Harry R. Gianneschi.

1 The first **NPAA \$1,000 Scholarship**, funded by alumni contributions, is awarded to Stephanie Lomibao '03, a graduate of the “Nonprofit Leadership” certificate program, who was mentored by founding NPAA President Catherine Spear '81. Update (2006): After completing a bachelor’s degree in business at CSUF, Stephanie completed a master’s degree in public policy at USC and realized her dream of combining her interests in business and philanthropy by joining a corporate community relations team of a major financial firm.

Certificates are awarded to the first 18 graduates of the “**Certificate in Nonprofit Leadership**” in the Student Leadership Institute.

NPAA’s second seminar and mixer, “Celebrating Partnership,” features a discussion with Randy Au '79, Emily Keller '80, Mike McGee '78 and Karin Schnell '86 about the unique city-university-nonprofit partnerships that created CSUF’s Grand Central Art Center.

CSUF’s **American Humanics certificate** launches with a cohort of 8 students and one alumna. The **AH Community Council** and **AH Advisory Committee** finalize the curriculum guide and internship plan for the CSUF version of the program. Liberal Studies offers a thematic plan in nonprofit leadership.

Dr. Gregory Robinson (Social Science Research Center) receives a \$500 GCNR Research Stipend to present his paper, “**Patterns of Giving: A Preliminary Study of Ethnic, Political and Religious Differences Among Donors in Orange County (CA)**” with co-author Kathleen Costello at the 2001 Annual Meeting of the Association for Research on Nonprofit Organizations and Voluntary Action in Miami.

Dr. Mary Joice is appointed as the **Gianneschi Professor of Nonprofit Marketing** in the College of Business and Economics. (See page 14 for more information.)

A planned gift from **Beulah and Cecil Ballentine** establishes an endowment in support of the Gianneschi Center for Nonprofit Research and the Gianneschi Professor of Nonprofit Marketing, and particularly encouraging the Center's efforts to facilitate dialogue and interaction among both academics and practitioners around nonprofit sector issues.

In order to pursue more strategic alliances among the various campus departments, research centers and student programs that interact with or serve nonprofits, GCNR moves to the department of **Academic Programs** from its founding home in University Advancement.

GCNR convenes faculty from several departments and programs to explore alternatives to the American Humanics program that could be offered on campus. Courses that satisfy recommended competency requirements have been identified, the Center for Internships and Service-Learning can coordinate the internship requirements, and GCNR can assist with advisement.

NPAA's bi-annual seminar at the Golleher Alumni House attracts 60 alumni and nonprofit leaders for a panel discussion about "The Leveraging of Philanthropy." Speakers represent the Orange County Community Foundation, Arts Orange County, Orange County Register, Health Care Foundation, and United Way.

Dr. Carl Renold (Human Services) receives a **\$500 GCNR Research Stipend** to support his paper, "Technology in Nonprofit Organizations: High Tech Meets High Touch," presented at the 2002 Annual Meeting of the Association for Research on Nonprofit Organizations and Voluntary Action in Montreal.

2002



NPAA Board members Kim Bailey '98/'03, Keith Regan '78 and JoAnn Brannock '73/'75 greet alumni and guests at the Spring Mixer.



Communications major Reena De Asis '02 receives the second annual **NPAA \$1,000 Scholarship** from chapter president Ira Unterman '87 upon completing the nonprofit leadership certificate and mentorship with Kim Bailey '98/'03. Before graduating, De Asis serves GCNR as a student assistant on the 2000 town hall event, and produces the Orange County premiere of "The Vagina Monologues" to build awareness and support for domestic violence prevention programs.



Social Science Research Center and GCNR partner with Orange County Business Council and Orange County Volunteer Center to study corporate philanthropy and volunteerism in Orange County.



1



2



3



4



Twenty-four students receive the certificate in Public Service and Nonprofit Leadership at the Student Leadership Institute recognition banquet.

2003

1 The “**Community Involvement Survey of Orange County Corporations and Businesses**” Report is presented at a town hall meeting hosted by GCNR in the Ruby Gerontology Center before an audience of 250 corporate and nonprofit leaders.

American Heart Association in Irvine hosts **NPAA’s bi-annual seminar**, “Understanding and Growing the Nonprofit Relationship with Corporations and Corporate Volunteers,” featuring Disneyland’s CAST Initiative, Claim Jumper and the Shea Therapeutic Riding Center, and attracting 80 alumni and nonprofit leaders.

2 The third annual **NPAA \$1,000 Scholarship** is awarded to health science major Leslie Marlephansakul '03 (in photo, at left), who was mentored by NPAA member Mary O’Connor Harris '81 (right) of FACES in Fullerton. Upon graduation Leslie secures a job with a community hospital in Whittier. Update (2006): Her commitment to the health profession confirmed through on-the-job experience, Leslie is accepted into a graduate program to pursue a Master’s of Public Health degree.

3 NPAA members also fund a special award to Communications major Karine Kadyan '04 to allow her to attend the prestigious **Institute on Philanthropy & Voluntary Service** at Indiana University during the summer of 2003. Kadyan is GCNR research assistant in 2003-04, and after graduating secures a marketing position with a nonprofit senior center in Pasadena.

4 The Sports Club Irvine hosts **NPAA’s bi-annual seminar**, “Rejuvenation for Nonprofit Professionals: How to Avoid Burnout,” presented by Vivian Clecak of Human Options. In photo, she is shown on right with Kris Elftmann of Noelle Marketing Group (left), and NPAA President Agnes McGlone '91 (center).

GCNR is the first center in the nation to acquire complete financial data of Southern California nonprofits. GCNR undertakes a two-year project to classify 13,000 nonprofits and clean and analyze their financial data. With the Center for Nonprofit Management in Los Angeles, GCNR convenes a six-county advisory board to guide the project.

2004

5 GCNR convenes a working group of campus leaders to develop a website to help campus and community members to navigate CSUF's nonprofit programs and resources. **Nonprofit Connections** launches with support from a CSUF Mission & Goals Initiative grant to support marketing and awareness of this new tool and resource for the community.

Liberal Studies major Mable Reed '05 pursues the Nonprofit Leadership advisement track. GCNR provides advisement and arranges Reed's internship at the Grand Central Art Center.

The Girl Scout Council of Orange County hosts **NPAA's bi-annual seminar**, "Making Yourself More Marketable in a Challenging Work Environment," featuring a nonprofit board member's perspective from Lisa Rawlins of Warner Bros., and a recruiter's tips by Sarah Agee of Sterling Search.

6 The fourth annual **NPAA \$1,000 Scholarship** is awarded to Human Services major/Criminal Justice minor Nancy Nguyen '05, who was mentored by Scott Wylie of Whittier Law School. Nguyen graduates in 2005 and intends to pursue both a law degree and an MSW.

GCNR Director Kathleen Costello develops a new upper division/graduate course, "The Sociology of Charity and Nonprofits," offered in Fall 2004.

5

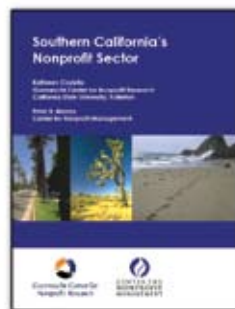


NPAA Vice President Charlene Mathe '82/'89 (left) presents Nguyen her scholarship.

6

2005

1



RESEARCH FINDINGS As of 1997 there were 1,899 active nonprofits in Orange County, reporting \$4.2 billion in revenues, and 13,370 in Southern California reporting \$38 billion in revenues.



Mentor Teri Niebuhr '97 congratulates scholarship recipient Fernando Mallory '06.

2

3

Orange County's

NONPROFIT CFO NETWORK

GCNR's third report on the nonprofit sector expands to include analysis of 13,000 nonprofits in all 10 Southern California counties. GCNR and CNM convene a series of focus groups with nonprofit leaders, funders, and professional advisors from throughout the Southern California area to respond to the report's findings.

1 GCNR and CNM publish the "**Southern California's Nonprofit Sector**" report in hard copy, online, and on CD. Findings are presented at town hall meetings in Los Angeles, Costa Mesa, Riverside, Santa Barbara, and Ventura, and for groups such as the United Way Council of Agencies and Planned Giving Round Table, throughout spring and summer of 2005.

Students receive their **Certificate in Public Service and Nonprofit Leadership** at the annual Student Leadership Institute awards ceremony.

2 Human Services major Fernando Mallory '06 receives the fifth annual **NPAA \$1,000 Scholarship**. Mallory is mentored by Teri Niebuhr '97 of HIS House in Placentia, and volunteers with a number of nonprofits in Orange.

3 GCNR launches the **Nonprofit CFO Network** for chief financial officers of Orange County's largest nonprofits. The Kickoff seminar by nonprofit tax authority John Valenzuela CPA is held at CSUF's Grand Central Art Center.

Children's Hospital of Orange County hosts **NPAA's bi-annual seminar**, featuring a presentation by Susan Wampler on "Exploring Nonprofit Board & Staff Dynamics," attended by 50 alumni and nonprofit leaders.

Southern California Edison commissions GCNR to produce a prototype database of nonprofits in Edison territories throughout Southern California.

YMCA of Orange County hosts the **Nonprofit CFO Network's** seminar on the Nonprofit Integrity Act and Sarbanes-Oxley accountability requirements for large nonprofits, presented by nonprofit law specialist Lisa Runquist, principal in the law firm of Runquist & Associates.

"Sociology of Charity and Nonprofits" course is offered in Spring semester.

GCNR works with founding advisors of the **"Certificate in Financial Planning and Management for Nonprofit Organizations"** to revise and re-organize the courses.

The new program launches in Spring 2006 at CSUF's Garden Grove campus.

Fiscal controls and fraud prevention are the topics of the **Nonprofit CFO Network's** second seminar of 2006. Certified Public Accountant and Certified Fraud Examiner John L. Tonsick, Director in the Forensic and Investigative Services Practice with Grant Thornton LLP, shared experiences and tips from his decades in the field, including important recommendations for nonprofits.

A record 28 students receive their **Certificate of Public Service and Nonprofit Leadership** at the Student Leadership Institute awards presentation in May.

GCNR launches **"Summer School for Nonprofits"** at CSUF's Irvine campus, including special half-day versions of existing courses, plus new courses developed especially for the event.

GCNR's ten-year review and future visioning process begins.

2006



GCNR recruits CSUF's Center for Entertainment & Tourism to collaborate on the **Orange County Cultural Indicators Study** for Arts Orange County and the Orange County Community Foundation. Findings from GCNR's study and CET's survey of nonprofit arts organizations are presented at the annual Arts Orange County conference, attended by 250 people.



Masters of Public Health candidate Elena Guzman '06 receives the sixth annual **NPAA Award** in recognition of her accomplishments and her intention to pursue a career in the nonprofit sector as a health advocate. Guzman was mentored by CSUF alumna Michele Silva '86 of Maternal Outreach Management Systems (MOMS). Here, Guzman (R) receives her award from NPAA Vice President Charlene Mathe '82/'89 (L).

DR. MARY JOYCE, *Gianneschi Professor of Nonprofit Marketing*



Dr. Mary Joyce accepted the named professorship in Fall 2002, and began developing the educational, research, and service links between the Department of Marketing and College of Business and Economics at CSUF and the nonprofit community in Orange County, as well as surrounding and other areas. Dr. Joyce

served on the boards of Goodwill Industries of Orange County (2003-2006) and the Council on Aging of Orange County (2003-2006), and continues to be a board member of the National Policy and Advocacy Council on Homelessness (2004-present) and the Tucker Wildlife Sanctuary (2004-present). Board membership has helped Dr. Joyce to identify future service learning projects for her students, as well as other students in the College and University.

Multiple classes in marketing and business communication, as well as gerontology, have been targeted for service learning projects that involved nonprofit and social marketing, as well as social entrepreneurship. Students have completed marketing research, designed marketing communication plans, written marketing plans, and developed feasibility studies for new nonprofit ventures. Organizations that have benefitted from student efforts since the Fall of 2002 to date include: Fullerton Arboretum (satisfaction survey), California Surf Lifesavers' Association (bi-lingual campaign targeting young Hispanic males to practice safe beach practices), Goodwill Industries of Orange County (creating a hipper image for Goodwill stores in Orange County, building B2B awareness for the document destruction business, and proposing plans for a gym

for people with disabilities), the ALS Association of Orange County (marketing communication plans to increase public awareness and donations), National Policy and Advocacy Council on Homelessness (marketing communication plans that led to a fundraising event in December of 2005, Homelessness Isn't Funny, which was hosted by Will Forte of Saturday Night Live fame), Feedback Foundation (strategic marketing recommendations that followed from a marketing audit of the organization), and Healing Odyssey (marketing communication plans to increase awareness and donations for this organization that helps cancer survivors to take control of their lives post-cancer).

In addition, Dr. Joyce has worked with a variety of organizations in Orange County to help them with strategic planning (Goodwill Industries of Orange County, American Red Cross of Orange County, YMCA of Orange County) and research (Council on Aging of Orange County, Volunteer Center of Orange County). She is a member of the Graduate Program Council for the M.S. in Gerontology and served on the Advisory Board for the Center for the Study of the Economics of Aging. She has spoken with the Association of Fundraising Professionals group in Orange County on branding, and the Nonprofit Professionals Alumni Association of CSUF on managing through turbulent times and how to resurrect nonprofit organization trust among the public.

Dr. Joyce has recently published articles on nonprofit marketing and social entrepreneurship in several scholarly journals, and has presented in the same research areas at numerous conferences.

In addition to her Department teaching assignment, Dr. Joyce leads a graduate course on nonprofit marketing and social entrepreneurship, and has taught for the Volunteer Center of Orange County.

Our thanks to our donors, colleagues, advisors, focus group participants, research associates, and others whose support, expertise and participation have made the Center's first 10 years possible.

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GIANNESCHI CENTER FOR NONPROFIT RESEARCH: THE FIRST TEN YEARS

We gratefully acknowledge the key involvement of the following participants in advisory boards, focus groups, research teams, educational programs, town hall events, and other projects during our first 10 years.

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Jo Ellen Allen, *Southern California Edison*

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 Daniel J. Walsh, *Saddleback Community College*
 John Webb, *County of Orange †*
 Maria Chavez Wilcox, *Orange County's United Way*
 Jeffrey Wilcox, *Executive Consulting for the Nonprofit Sector*
 Bill Wood, *PacifiCare Foundation*
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The Gianneschi Center for Nonprofit Research at Cal State Fullerton exists to support and encourage the work of Orange County's many charitable organizations as the repository for data about the sector. Helping nonprofits and the entire community to better understand the work of this important sector is our primary mission. Ongoing activities include:

- conducting periodic studies and encouraging scholarly research about the sector,
- encouraging scholarly research of the sector,
- involving practitioners and funders in designing future research projects, and
- facilitating meaningful discussion of issues affecting the non-profit sector.

In addition, the Center serves as a liaison between the university and nonprofits by:

- creating ways for students to prepare for nonprofit careers and involvement opportunities,
- building connections with nonprofit alumni through professional development opportunities, student mentorships, and networking events,
- strengthening nonprofit capacity through continuing education and professional development programs.

The Center's operations are supported through earned income, sponsored research, and memberships.

All Gianneschi Center for Nonprofit Research reports and pages may be downloaded free of charge at www.fullerton.edu/GCNR.

Cal State Fullerton Resources by, for, and about nonprofits may be browsed online at www.fullerton.edu/NonprofitConnections.

The Nonprofit Professionals Alumni Association's website is www.fullerton.edu/NPAA.



Gianneschi Center for
Nonprofit Research



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