Celebrating a 20-year Journey:
Growing the Good for Orange County
Today and Tomorrow
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## Financial Section

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## In Appreciation

We thank the generous people and organizations who contributed photographs for this report. Historic Crystal Cove September 1989 (cover) and Crystal Cove boardwalk at sunset (inside cover) photographs by J. Christopher Launi, courtesy of Crystal Cove Alliance; OCCF leadership and staff (pages 1 and 17) by Sheri Geoffreys; orange groves (pages 2-3) photo courtesy Orange County Archives; Laguna Canyon (page 9) photograph by Andrew Castellano, Laguna Canyon Foundation; Pacific Symphony (page 10); Mission San Juan Capistrano (page 13); Disneyland Resort VoluntEARS (page 16); Laguna Canyon Foundation (page 16); Trails4All (page 18); Heritage Museum of Orange County (page 19). Thank you to Donna Summers, Summers By Design, for her creative design and production of this report.

## National Standards for Community Foundations

The Orange County Community Foundation was one of the first in the nation to receive certification for achieving National Standards for Community Foundations through the Council on Foundations. This seal confirms that OCCF demonstrates the legal, ethical, and service practices that place us among the most proficient and effective community foundations in the nation.

The Orange County Community Foundation’s IRS Form 990 (annual tax filing) is available on its Web site at www.oc-cf.org or to request a copy please call 949.553.4202.
Welcome from the Chairman & President

This Annual Report celebrates what has been a 20-year journey to build the Orange County Community Foundation into a strong, effective and enduring resource for the people of Orange County. In partnership with the most passionate donors, innovative nonprofit leaders, and creative and generous business minds we could hope for, many significant milestones have been achieved for the benefit of our community.

Our inaugural Annual Report published in 1990 listed assets of $409,000. By June 30, 2009, OCCF’s charitable assets had grown to $101.4 million. But even more important is the dramatic growth we have experienced in our giving to meet community needs. Since our inception, OCCF has provided grants and scholarships totaling $144 million to nonprofits here in Orange County, across the nation and around the world.

This dramatic growth in both assets and granting has placed us among the leading community foundations in the nation. Although we are still relatively young compared to many of our colleagues, we rank in the top 5 percent among more than 750 U.S. community foundations for contributions received, the top 7 percent in grant-making, and the top 12 percent in total assets.

Our 20th anniversary celebration comes on the heels of one of the most challenging years that our community — and our nation — has ever faced. The growth and experiences of the past two decades have prepared us to respond exactly as a community foundation should during this time of unprecedented need. Now, more than ever, we see the importance of our role as Orange County’s community foundation. This has moved us to heighten our community outreach and strategic partnerships in order to provide an extra measure of support to the local nonprofit sector when it is needed most.

We are proud to report that OCCF’s granting hit an all-time high of $21.3 million in 2009. This investment was driven primarily by the generous response of our donors to the surge of needs in our community. At the same time, we expanded our hands-on outreach to local nonprofits through training, technical assistance and on-site resource and referral support.

The highlight of our expanded community outreach over the past year was our “See the Need, Seed the Change” initiative to provide support for vulnerable families, children and the frail elderly — those most impacted by the economic crisis. With the support of our donors and the broader community, OCCF granted $832,500 to 32 local nonprofits which provided food, shelter and critical aid during this time of extraordinary need.

We know that our mission to encourage, support and facilitate philanthropy in Orange County is needed now more than ever. We thank you — our donors, nonprofit colleagues and corporate partners — for walking with us on this journey for the good of this community… today, tomorrow and forever.

We look forward to facing together the challenges and opportunities that the next stage of the journey will bring.

Sincerely,

Dick Allen
Chairman of the Board

Shelley W. Hoss
President

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<th>Year</th>
<th>Event</th>
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<td>1989</td>
<td>Founded by Judith Swayne. First grant received for operations.</td>
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<tr>
<td>1991</td>
<td>First collaborative project launched: MOMS Fund for maternal health care.</td>
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<tr>
<td>1992</td>
<td>Board awards first discretionary grants totaling $50,000 to nonprofits. First memorial fund opens.</td>
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<td>1994</td>
<td>Jane Deming Fund is first fund to be formed by bequest.</td>
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<tr>
<td>1995</td>
<td>Unrestricted endowment receives $1 million from Harry and Grace Steele Foundation and $3 million challenge grant from The James Irvine Foundation.</td>
</tr>
<tr>
<td>1996</td>
<td>Total assets exceed $10 million.</td>
</tr>
<tr>
<td>1997</td>
<td>OCCF raises $11 million to complete challenge grant for unrestricted endowment. Disneyland® employees establish community fund.</td>
</tr>
<tr>
<td>1998</td>
<td>Hispanic Education Endowment Fund reaches $1 million asset goal.</td>
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Since 1989, the Orange County Community Foundation has supported private giving for community good. We have walked in partnership with generous individuals and families, corporations and community and business leaders to make charitable giving count. This Annual Report marks two decades of collective impact in Orange County. We look forward to navigating the path ahead to an even healthier and more vibrant community.
Casa Romantica receives $1 million grant for restoration. OCCF celebrates 10th Anniversary.

Board adopts mission: To encourage, support and facilitate philanthropy in Orange County.

Largest contribution in OCCF history — $9.1 million — received from the Margaret E. Oser Foundation.

OCCF launches Next Generation Philanthropy group.

Total assets reach $101.4 million; cumulative granting of $144.3 million.

1999
Founders Judy Swayne retires. Shelley Hess named president.

2000
Assets: $58.2 million; Annual granting: $7.2 million.

2004

2007
$100 million milestone reached in cumulative granting for the good of our community.

2008
“See the Need, Seed the Change” raises $832,500 to help OC neighbors impacted by the economic crisis.

2009
Total assets reach $101.4 million; cumulative granting of $144.3 million.

2009 Grants
Totaling $21.3 million

Annual Grants
Cumulative grants over 20 years: $144.3 million

Annual Grants
Cumulative grants over 20 years: $144.3 million

2009
Total assets exceed $100 million

Assets
Total assets exceed $100 million
The Orange County Endowment

Impact:
Since 1994, $7 million granted to meet local needs

OCCF’s endowment was established in 1994 with challenge grants of $3 million from The James Irvine Foundation and $1 million from the Harry and Grace Steele Foundation.

The Orange County Endowment is the only charitable fund devoted exclusively to meeting the needs of the people of Orange County.

Launched in 1994 with challenge grants from The James Irvine Foundation and the Harry and Grace Steele Foundation, the endowment grew to $10 million in just three years with the support of generous local donors. Since its inception, The Orange County Endowment has provided more than $7 million in grants to local nonprofit agencies working to feed the hungry, shelter the homeless, care for the frail elderly, prepare youth for success, and preserve unique natural resources.

One of the first grants from the endowment came during a time of dramatic growth in the number of children entering Orange County’s foster care system due to abuse or neglect. Court Appointed Special Advocates of Orange County (CASA) was awarded $14,340 in 1995 to increase the number of volunteers trained to serve as legal advocates for these children — often the only consistent, supportive adult they have in their lives. OCCF and its donors continue to be strong supporters of CASA, an organization that serves more than 800 abused and neglected children each year.

Fifteen years later, The Orange County Endowment is still changing lives in our community. In 2009, $250,000 was directed to the “See the Need, Seed the Change” campaign — our rapid response to the economic crisis of 2008-2009.

“When we set out to establish an endowment for Orange County, we could not predict the myriad of needs that the endowment would fill,” said early pioneer Ginny Ueberroth, chair of the endowment campaign from 1994-1997. “It is gratifying to see the positive impact we’ve had on this county over the years, especially for those in need.”
Growing Our Gift to the Community

On the occasion of our 20th anniversary, the Community Foundation has committed to taking the next critical step in the life of The Orange County Endowment by **doubling the fund to more than $20 million**.

We received the perfect impetus for this effort with a $3.5 million challenge grant from The James Irvine Foundation. OCCF responded by setting a goal of raising at least $10 million over the next three years, mirroring the original endowment campaign. This will enable us to double the impact that The Orange County Endowment can provide today and for generations to come. And with the support of a number of generous donors, we are on our way to achieving this goal.

We cannot envision a more fitting gift to the people of Orange County than the growth of The Orange County Endowment, a unique source of support for the needs of our community… *forever.*
Delivering Help to Neighbors in Need

For thousands of people in Orange County, the 2008-2009 economic crisis brought devastating realities. Friends, neighbors and family members lost their jobs, homes or health insurance, or simply could no longer make ends meet.

Between March 2008 to March 2009, unemployment in Orange County increased from 73,000 to 141,000 individuals—a jump from 4.5 percent to 8.6 percent of the county’s population. Former two-income families were forced to turn to food pantries to feed their children. Shelters exceeded capacity. And vulnerable children found themselves at even greater risk of neglect or abuse.

Local nonprofit service providers that were already struggling due to reduced donations and California’s budget cuts faced an avalanche of new demand for basic living needs. Some saw increased demand for services as high as 400 percent. And vulnerable children found themselves at even greater risk of neglect or abuse.

OCCF responded quickly to help nonprofits that provide food, shelter and critical aid. Under the leadership of the Board of Governors, we launched our first community-wide initiative: “See the Need, Seed the Change.”

The goal was to infuse $750,000 into Orange County-based nonprofits that deliver safety-net services to the most vulnerable populations affected by the economic crisis: families, children at risk and the frail elderly. Never before had OCCF aimed to make such a substantial impact in so little time.

The Orange County Endowment, a permanent source of funding to meet local needs, enabled us to immediately seed this critical effort with $250,000. Then, in just two weeks, a number of generous donor advisors matched that investment, resulting in $500,000 in challenge funds. This total allowed the Community Foundation to match every $1 donated with $2 (up to the first $250,000).

The public was invited to participate over 30 days. Word spread quickly via email, our website, Facebook and Twitter. The response was both encouraging and swift. Some people mailed hand-written notes with $5 or $20 bills, while other individuals and corporations contributed as much as $30,000.

Donors, corporations and individuals inspired to help our neighbors in need led us to not only reach our goal, but exceed it. Less than 30 days after contributions were received, the Community Foundation distributed $832,500 in “See the Need, Seed the Change” grants to 32 local nonprofit organizations. The funding provided these agencies a much needed infusion of support and yielded life-changing returns.

For a mother named Angela, “See the Need” helped her keep her children safe. The family fell behind on utility and rent payments when her husband’s work hours were reduced. We Care of Los Alamitos, which received a $25,000 grant, paid the family’s bills and reclaimed and registered her vehicle.

“You personally helped to renew my faith in people and allow assistance in my life without feeling ashamed. It was a tremendous comfort to my family, helping a mother to protect her kids from the street,” she said.

In a time of overwhelming need, together we planted a seed for community compassion and response.
Seed the Change
Grant Recipients

Vulnerable Families
Anaheim Interfaith Shelter
Catholic Charities of Orange County
Community Action Partnership of Orange County
Families Forward
Family Assistance Ministries
Fullerton Interfaith Emergency Services
Gary Center
Homeless Intervention and Shelter House
Illumination Foundation
Orange Coast Interfaith Shelter
Orange County Rescue Mission
Project Dignity
Salvation Army
Second Harvest
Serving People in Need
Share Our Selves
South County Outreach
Southwest Minority Economic Development Association
Thomas House Temporary Shelter
We Care of Los Alamitos

Children at Risk
Child Guidance Center
Children’s Bureau of Southern California
Human Options
Interval House
Laura’s House
Orange County Child Abuse Prevention Center
Women’s Transitional Living Center

Frail Elderly
Acacia Adult Day Services
Alzheimer’s Family Services Center
Community SeniorServ
Irvine Adult Day Health Services
South County Senior Services
Donors Chart a Course for Impact

Each year the Orange County Community Foundation helps donors map out a course to achieve charitable impact, but in 2009 our journey took us even farther than we imagined. Despite a nationwide economic crisis, OCCF and its generous donor advisors granted $21.3 million to community organizations — an increase of nearly $1 million over the previous year. Here are some of the ways we are working with donors to build a sustainable impact in Orange County.

Impact:
Hundreds of Orange County children can better manage diabetes

A Family’s Heart for Philanthropy Brings Hope for Diabetes
Dick and Mary Allen view philanthropy as a critical component to a healthy and vibrant community.

When their granddaughter Hannah was diagnosed with Type 1 diabetes at age two, the Allen family quickly learned how complex, demanding and expensive managing the disease can be. Constant attention is required for frequent finger pricks, insulin shots and proper nutrition.

They wondered: How do people with limited access to information and resources manage this life-long disease? The reality is that many Orange County residents — especially those from disadvantaged communities — go without the help they need.

The Allens’ vision was to create a community resource for everyone impacted by diabetes — regardless of age or ability to pay. A heartfelt $1 million gift to Hoag Hospital in Newport Beach led to the June 2009 opening of The Mary & Dick Allen Diabetes Center. With a special focus on underserved children, it provides multilingual and multicultural treatment, education and outreach to Orange County’s diverse populations affected by diabetes.

Thanks to Dick and Mary’s vital work, vulnerable children and families in Orange County will be equipped to face diabetes head-on.
S.L. Gimbel Foundation Fund Goes the Distance
Susan Gimbel, an Orange resident, was an ultra-marathon runner who loved the outdoors. She was passionate about a variety of causes — from the arts and education to cancer research and human dignity. She founded the S.L. Gimbel Foundation to advance community work in these areas. Sadly, she lost a battle with ovarian cancer in 2006.

The S.L. Gimbel Foundation turned to the Orange County Community Foundation to realize Susan’s vision. The partnership made sense on many levels, especially when the S.L. Gimbel Foundation realized its focus was closely aligned with OCCF’s work in areas such as the arts, education and human services.

The S.L. Gimbel Foundation granted $545,000 over the past year to a broad range of agencies. This support helped minimize the funding gap many nonprofits experienced as a result of the economic crisis. Looking forward, Susan’s legacy will carry on as much-needed dollars continue to be infused into the communities she dreamed of supporting.

A Creative Approach to Corporate Giving
The Disneyland Resort in Anaheim and the Orange County Community Foundation have partnered together for 12 years to make Orange County a happier place to live and learn.

The county’s largest employer with approximately 20,000 “cast members”, Disneyland turned to the Orange County Community Foundation to establish an employee giving fund in 1997. The Disney VoluntEARS Community Fund has since granted more than $3 million to nonprofit agencies using innovative approaches to address critical community needs.

Cast members can nominate nonprofit agencies of their choice for grant consideration. Among the fiscal 2009 recipients were the American Heart Association, Blind Children’s Learning Center, Down Syndrome Association of Orange County, and Inside the Outdoors.
Delivering Solutions for Local Needs

Community foundations are collaborative by design, bringing together the best blend of local leaders and resources to address the needs of their community. Over the past 20 years, the Orange County Community Foundation has been honored to partner with passionate and visionary leaders to develop innovative approaches to the county’s most pressing needs.

Impact:
Increased support and participation in local arts

Sparking Interest in Local Arts

A strong cultural sector stimulates economic growth, supports academic success, and fosters connections in diverse communities. For these reasons, The James Irvine Foundation launched its statewide Communities Advancing the Arts Initiative in 2004. It awarded its largest grant to the Orange County Arts Initiative — a collaboration between the Orange County Community Foundation and Arts Orange County that aims to strengthen community-wide support and participation in local arts.

A comprehensive study of county residents’ attitudes toward the arts set the stage for action. Over 90 percent of respondents felt that a vibrant cultural sector contributes to a better quality of life, but most residents had very limited awareness of local arts and cultural offerings.

In response to these findings, OCCF and Arts Orange County launched SparkOC.com, an innovative, one-stop website for arts and cultural events in Orange County. The site includes listings of over 1,000 local events, workshops and festivals and has attracted nearly 400,000 unique visitors since its debut a year ago. With support from The James Irvine Foundation and generous local donors, SparkOC has opened a vital new pathway for increased community participation and support of local arts.
Protecting Orange County’s Living Legacy
Orange County is home to one of the most unique and biologically diverse natural environments in the world. In 2004, the Orange County Community Foundation created an environmental grant program to enhance public understanding and stewardship of our precious natural resources.

An initial gift from Frank and Judy Colver along with funds directed by OCCF’s Board of Governors provided for $100,000 in environmental grants during the first year. With our support, the Orange County Coastkeeper repopulated endangered fish species along the Newport Coast. Trails4All restored eight major watersheds and a wetland. And Windows-On-Our-Waters took marine education for kids on the road with the TidePool Cruiser.

Over the past five years, $730,000 has been awarded to provide environmental education to thousands of children, maintain trails and parkways and preserve and protect local resources. Continued collaboration with local experts and dedicated philanthropists will ensure that residents and visitors alike can enjoy Orange County’s unique natural beauty for generations to come.

Impact:
Since 2004, $730,000 granted for environmental education and preservation

Bringing Science to Life
Success in middle school science is essential for continued academic achievement in high school and beyond. In 2002, the Orange County Community Foundation discovered that nearly one-half of the county’s eighth grade students were failing this critical subject. As a longtime supporter of local education programs, OCCF saw a clear and undeniable call to action. The goal: increase and sustain science literacy among Orange County middle school students.

OCCF’s answer was to bring science to life in middle school classrooms across the county by establishing Science@OC, an initiative that shifted textbook science to hands-on, experiential learning. The foundation leveraged the efforts of the Beckman@Science program to introduce all eighth grade physical science teachers in Orange County to the concept of inquiry-centered science through teacher development and provision of exemplary classroom materials.

Science@OC has since inspired and engaged more than 12,000 students. In the county’s lowest-scoring district, Santa Ana, the science proficiency rate has catapulted from a dismal 27 percent to 43 percent and is still climbing. Strategic plans for science education in three Orange County school districts will bolster the science learning of an additional 14,650 students over the next three years.

Impact:
Increased science literacy among OC middle school students
The board and staff of the Orange County Community Foundation are committed to the long-term sustainability of the local nonprofit sector. In addition to financial support, we work to bolster the effectiveness of local nonprofit organizations by providing planned giving tools, training and educational resources. The following programs are examples of our ongoing efforts to strengthen the local nonprofit sector.

**Nonprofit Sustainability Program**

The Orange County Community Foundation developed the Nonprofit Sustainability program in 2008 to provide relevant, cost-effective education and organizational coaching to nonprofit organizations interested in expanding their focus on planned giving and building endowment.

Through the program, our team guides and supports local nonprofit organizations as they begin to broaden their revenue mix to build endowments and ultimately sustain their critical work in the community. It helps nonprofit agencies establish the infrastructure and begin the organizational process of incorporating endowed giving options in their fundraising efforts.

**2009 Participating Agencies**

Alzheimer’s Family Services Center  
Bolsa Chica Land Trust  
Camp Fire USA — Orange County Council  
Crystal Cove Alliance  
Families Forward  
Girls Incorporated of Orange County  
Inside the Outdoors Foundation  
Irvine Adult Day Health Services  
Jewish Family Service of Orange County  
Public Law Center  
Share Our Selves  
Tustin Public Schools Foundation  
United Cerebral Palsy of Orange County  
WISEPlace
Legacy Partners Program
The Orange County Community Foundation is actively working with local nonprofits to fulfill their missions by broadening their base of support through the development of endowment and planned giving programs. Fostering the long-term stability of local charitable organizations through legacy giving will ensure that their programs and services will be here to benefit Orange County residents for generations to come.

While the importance of endowment development is understood, it is often difficult to implement — largely due to limitations of structure, experience and resources. Established in 2006, the Legacy Partners program today provides 18 local nonprofits with a cost-effective, structured program to build their endowment capacity through planned and deferred giving. The goal of the program is to help participating nonprofits:

- Create and launch an effective program tailored to their organization
- Secure legacy gift commitments from new and existing donors
- Provide a consistent focus on building endowment
- Cultivate relationships that may also lead to current gifts

2009 Legacy Partners
Boys & Girls Club of Laguna Beach
Canyon Acres Children and Family Services
Boys & Girls Clubs of Capistrano Valley Community Service Programs
Girl Scout Council of Orange County
Goodwill Industries of Orange County
Irvine Barclay Theatre
J.F. Shea Therapeutic Riding Center
Laguna College of Art + Design
Mission San Juan Capistrano
Ocean Institute
Orangewood Children’s Foundation
Second Harvest Food Bank of Orange County
Taller San Jose
South County Senior Services
St. Margaret’s Episcopal School
Surfrider Foundation
YWCA of North Orange County

Impact:
South County Senior Services has secured 22 planned gift commitments
Philanthropy Hall of Fame

This Hall of Fame is a tribute to the individuals, families and organizations that we have recognized over the years for their commitment to philanthropy in our community. With grateful appreciation, we thank them for their generosity and dedication to enriching Orange County for us all.

Excellence in Philanthropy Awards

The Orange County Community Foundation’s Excellence in Philanthropy Awards honor the work of those who have played a vital role in transforming lives in our community today and for generations to come. We have acknowledged the following individuals for their extraordinary efforts to make our community a better place to live, work and thrive.

2008

The Muckenthaler Family
North County Impact Award

William and Joan Cvengros
South County Impact Award

Sister Eileen McNerney
Legacy of a Lifetime Award

2007

Randall Bone
Initiative Award

The PIMCO Foundation
Impact Award

Dr. Edward and Helen Shanbrom
Legacy Award

2006

Bill and Vicki Booth
Legacy of My Family Award

Paul and Scottia Evans
Legacy of My Lifetime Award

Captain Dan McCoy
Legacy for My Community Award
Power-Packed Philanthropist Honorees

The Power-Packed Philanthropist Award is presented to individuals whose philanthropic efforts have led to a substantial and positive impact in our community. The following awardees were nominated by a professional or community organization as key members that have gone beyond their professional responsibilities and significantly advanced philanthropy in their communities.
Our Partners in Philanthropy

Our partners in philanthropy help the Orange County Community Foundation fulfill its mission to encourage, support and facilitate philanthropy in Orange County.

Friends of the Foundation
Through the support of the following donors, the Community Foundation has been able to further its efforts to strengthen and support nonprofit organizations in Orange County over the past year.

Donald and Peggy Albert
Margaret Bortz
Jeff and Bonnie Dankberg
Dodge and Cox
Fred and Jeanne Golding
Karina Hamilton
William and Cherie Hart
Donald and Carolyn Honer
Barry Khan and Cheryl Rolapp
Mark and Kim Krouse
Derek Kumm
James and Katie Loss
Peter and Helen Maxwell
Parker Hannifin Foundation
Jack Pike
Dixie Shaw
Hauw Suwito
Laura Tarbox
Richard Verry

Corporate Partners
The following corporations and their respected leaders have graciously committed to the development of a transition fund that will support our community outreach activities until the “For Good, For Ever” endowment is fully funded. Their impact on our community will forever be evident.

Disneyland Resort
Edwards Lifesciences
Paul F. Folino, Executive Chairman, Emulex
First American Title Corporation
Orange County Register
Rick Muth Family, ORCO Block Co.
Raj Manufacturing Inc.
SARES•REGIS Group

2008 Annual Meeting Sponsors
Thank you to the following sponsors whose long-standing support and understanding of the Community Foundation’s mission are truly appreciated:

Gold
Ranney and Priscilla Draper
Elizabeth Steele

Silver
Jensen Investment Management
Merage Foundation
Pacific Kies / Shea Center
River Road Asset Management

Bronze
Beacon Pointe Advisors
Deloitte LLP
Disneyland Resort
Dodge & Cox
Greenberg|Graham Advisors
Bill and Pat Podlich
Keith and Judith Swayne

Table Hosts
Arts Orange County
The Olin Group
The Orange County Community Foundation Team

Donors who give through the Orange County Community Foundation have access to the expertise of OCCF’s staff to maximize the impact of their giving. Our team works together to produce the results that continue to earn the trust and respect of donors and the greater community.

Pictured left to right: Front row: Andrea Landis, Roland Ho, Tracy Branson, Shelley Hoss, Todd Hanson, Natalie Bishop, Jessamyn Miller; Back row: Joanne Udell, Anne Leinart, Rachel Hansen, Jeff Swanson, Cynthia Ragland, Patricia Benevenia, Dan Ball, Claudia Montesano, Diane Cleary

Executive
Shelley Hoss, President
Anne Leinart, Executive Assistant

Finance & Administration
Tracy Branson, CPA, Vice President of Finance and Administration
Diane Cleary, Accounting Manager
Dan Ball, Staff Accountant
Joanne Udell, Human Resources and Operations Manager

Development & Gift Planning
Jeff A. Swanson, CSPG, Vice President of Development and Gift Planning
Roland Ho, CSPG, Gift Planning Associate

Donor Relations & Programs
Todd M. Hanson, Vice President of Donor Relations and Programs
Natalie Bishop, Donor Relations and Program Officer
Patricia Benevenia, Program Officer
Claudia Montesano, Program Officer
Rachel Hansen, Program Assistant

Marketing & Communications
Cynthia Ragland, APR, Vice President of Marketing and Communications
Jessamyn Miller, Marketing and Communications Manager
Andrea Landis, Intern
Giving Through OCCF

At the Orange County Community Foundation, we make supporting local community interests easy, effective and enduring. We offer a full range of services uniquely designed to enable donors to make an immediate impact today, as well into the future. Our donor services and gift planning team is responsive, knowledgeable and eager to meet your needs. Explore the many ways to become part of the Orange County Community Foundation and make a lasting contribution to your community.

Why Give

Enjoy Maximum Tax Benefits
As a fully tax-exempt 501(c)(3) charitable organization, the Orange County Community Foundation can help you achieve your financial objectives and fulfill your philanthropic intentions through its personalized gift planning and grant-making services.

Streamline Your Giving
Simplify your charitable giving by consolidating through OCCF to the extent you choose. Giving through OCCF allows you to avoid the legal complexities and administrative burdens that come with establishing and maintaining a private foundation. It also helps organize and bring focus to the giving you are doing on your own.

Receive Recognition or Donate Anonymously
Many donors appreciate the privacy afforded by working through the Community Foundation. You determine whether your charitable contributions are made in your name or anonymously. You also have the ability to honor or memorialize a loved one when naming your fund or making grants.

Benefit from Community Knowledge
Put the rich knowledge and experience of the Community Foundation to work for you. OCCF’s staff stays abreast of the latest philanthropic trends and community needs, making us an invaluable resource when determining how you want to focus your charitable dollars. At your request, we can provide recommendations of established and effective programs to achieve the impact you desire. In addition, we can help create a strategic giving plan for you and your family.

Take Comfort in Our Accountability
All donors with an OCCF fund receive quarterly statements detailing financial activity, including contributions, grants and investment earnings. We conform with generally accepted accounting principles and are audited annually by Moss Adams LLP. We publish our financial statements in our Annual Report and on our web site.

Create a Lasting Legacy
Our planned giving team can help you fulfill your charitable mission today and beyond your lifetime. No matter what your personal or financial goals, we offer a wide range of planned giving solutions. You can also establish a fund through a bequest or direct funds via your will.
What to Give

We accept a wide range of gifts including:

- Cash
- Publicly-traded securities
- IRAs or life insurance
- Remainder of a Charitable Remainder Trust
- Remainder of a Charitable Gift Annuity
- Lead gift of a Charitable Lead Trust
- Real estate
- Closely-held and pre-IPO stock

How to Give

The Orange County Community Foundation offers a wide variety of fund options tailored to each donor’s specific giving needs and objectives. This flexibility allows you the opportunity to make the maximum impact in your areas of charitable interest and experience the greatest satisfaction and reward through your giving.

Donor-Advised Funds are established by donors who wish to receive maximum tax benefits while providing ongoing support to charities of their choice. With this type of fund, you receive an immediate tax deduction and you can provide support to the causes you care about most while OCCF takes care of the legal, financial and administrative logistics.

The Orange County Endowment is one of the most powerful ways to leave a permanent legacy in the community. Under the guidance and stewardship of OCCF’s Board of Governors, grants from this fund are used to address the most critical needs of the community as they change over time.

Field-of-Interest Funds direct grant distributions to projects or programs within your defined areas of interest, such as the arts, health and wellness, education, or any area you choose.

Designated Agency Funds are created to provide support for the benefit of a specific nonprofit organization or group of agencies of interest to you.

Scholarship Funds provide monetary support for students utilizing criteria you establish such as a defined area of study or specific backgrounds.

Legacy Funds are created through a bequest in a trust or estate and ensure that your philanthropic spirit lives on through the support of your favorite organizations or causes.

To Learn More

For more information or to open a fund, please contact Jeff Swanson, Vice President of Development and Gift Planning at (949) 553-4202 ext. 39 or jswanson@oc-cf.org.
Creating a Philanthropic Legacy

Assisting donors in creating personal and family legacies is one of our highest priorities at the Orange County Community Foundation. Because every individual has different philanthropic goals, we work to ensure the causes you care about most are supported both during your lifetime and beyond.

By establishing a legacy fund, your charitable intentions can live on with the Community Foundation’s prudent stewardship. We gladly work with your professional advisors to ensure that your charitable as well as financial goals can be achieved. Our planned giving services allow you to set up your charitable legacy utilizing a wide range of assets, including:

- Cash or appreciated assets
- Trust distribution
- Life insurance
- Retirement plan assets
- Real estate

The following examples demonstrate the power of endowment and the effectiveness of our stewardship.

Jane Deming Fund

Through an estate plan, Jane Deming established an endowment fund at the Orange County Community Foundation in 1995 with an initial gift of $779,625. She wished to extend her lifelong support of music, education and therapeutic services for troubled families and youth. Through OCCF’s prudent stewardship, the Jane Deming Fund has granted nearly $650,000 since its inception. These charitable dollars have supported a wide range of programs, including a monthly program for students of the Boys & Girls Clubs of Fullerton at the Muckenthaler Cultural Center, and the Pacific Symphony’s Class Act music education program, which brings professional musicians in residency to Orange County classrooms.

Margaret E. Oser Fund for Women

Margaret E. Oser left a remarkable philanthropic legacy to benefit women’s health, education and social welfare through the establishment of a private foundation in her estate plans. After partnering with the Orange County Community Foundation for several years to carry out its grant-making programs, the Oser foundation’s trustees decided in 2005 to transfer its $9.1 million corpus to OCCF — the largest endowed gift in OCCF history. Since 2001, OCCF has awarded grants totaling $3.5 million from the Oser fund to nearly 100 nonprofit agencies in Southern California working in the areas closest to Margaret Oser’s heart.

Impact:

OCCF manages
20 legacy funds
with assets of
$20.5 million
Donors

Contributions of $250 or more

Anonymous
83rd Avenue
Laurel Aarsvold
Ace Tube Bending
Tralance Addy
Hank and Marcia Adler
Adorno, Yoss, Alvarado and Smith
Ojaala Ahmad
Wylie and Bette Aitken
Don and Peggy Albert
Lloyd Albertson, Jr.
Mr. and Mrs. John Alderson
Dick and Mary Allen
Samuel and Susan Anderson
Apex Foundation
Dolores Arnott
Arts Orange County
AT&T
Atkinson, Andelson, Loya, Ruud and Romo
Gary and Linda Augenstein
Bryan and Barbara Auxier
Stephen Bachor
Steven and Cynthia Bahlman
Baker and Hostetler
Virginia Baker Charitable Trust
Banco Popular North America
Bank of America Foundation
Bank of the West
Beacon Pointe Advisors
Beall Family Foundation
Joseph Beaumont
Patricia Beckman
John and Linda Benner
James and Christine Berkson
Raj and Marta Bhathal
Eric and Connie Boden
Helen Boileau Estate
Dorothy Booth Charitable Trust
Nicolas and Rhonda Bozzo
Doug and Tracy Branson
Brava Ventures
Leo and Beverly Brennan
Bristol-Myers Squibb Company
Bristol-Myers Squibb Foundation
Michael Buren
Terry and Bonnie Cairy

California State Fullerton Foundation
Frank and Susan Calabretta
Richard Calandro
California Community Foundation
Cal State Fullerton Philanthropic Foundation
Cambridge Financial Partners
Arlean Campbell
Michael and Etta Cannon
Ted and Betty Carlton
Carpenters Union, Local 2361
Claudette Carroll and Diane Swimmer
Joseph and Leah Carroll
Casa Romantica Cultural Center and Gardens
Chapman University
Lawrence Chavez
Chevron Products Company
City of Dana Point
City of Fountain Valley
City of Santa Ana
City of Seal Beach
Coast Community College District Foundation
Coastline Community College
Eileen Coe
Community Foundation of Jewish Federation of Orange County
Community Foundation of Louisville
Compassionate Bridges Worldwide
Cultural Awareness
Contreras Ice Cream
Rocio Contreras-Regalado
County of Orange
Crew Orange County
Frederick and Bridget Crook
Croul Family Foundation
CSU Fullerton Auxiliary Services Corporation
Earl and Laurine Culver
William and Joan Cvengros
Jeffrey and Bonnie Dankberg
Armando Davila
Marc Davis
Deloitte
Jerry and Carol Denham
William Dishon
Disney Worldwide Services
Diverse Staffing Solutions
Dodge and Cox

Lawrence and Kristina Dodge
Stephen Doktorczyk
Patrick and Paula Donahue
Terrance and Andrea Donahue
M. Douglas
Ranney and Priscilla Draper
DSI General Contractor
E.J. De La Rosa and Company
Henry and Donna Eagar
Edison International
Education Dreams Fund
Edwards Lifesciences
James Egan and Susan Karlshoej
Marta Egan
Elliott Family Foundation
Frank Ellis
Entertainment Industry Foundation
Alejandro Espinoza
Essex Realty Management
Paul and Scottia Evans
Falling Leaves Foundation
Kerry Farrish
FFF Enterprises
First American Corporate Services
Flanagan Family Foundation
Eric Fleetwood
David Fleming and Judith Mirkin
Ford Motor Company
Foundation for Educational Administration
Fox Group
Freedom Communications
Steven and Tracy Friedmann
Frome Family Foundation
David and Rachna Fruchbom
Fullerton College
Carrie Garufis
The Gas Company
Steven and Leslie Gates
Richard and Mary Gerhold
Robert Giffrow and Judith Davis
S. L. Gimbel Foundation
Goodwill Industries of Orange County
Ellen Gordon
Daniel and Lisa Grable
George and Reva Graziadio Foundation
Scott and Karen Green
Jay and Janett Greenberg
Donors (Continued)

Robert Greenberg
Greenberg|Graham Advisors
Greg Lerum Insurance
Guidepoint Global
B.M. and Janet Hackley
Pat Halberstadt
Donald and Phyllis Hall
Bob and Karina Hamilton
Evan and Elizabeth Hand
Steven and Melissa Hanle
Todd and Jami Lou Hanson
Harris and Ruth Painting Contracting
Vera Harrison
Stephen Harvey
Heavy Industrial Tool Service Company
Jeanette Bertea Hennings Foundation
Jeremiah Henry and Regina Soliman
Eugene and Lisa Herman
Linda Herman
Aaron and Maria Herrera
Janet Higgins
Peter and Julie Hill
Deborah Hipsher
Hispanic Bar Association of Orange County
Hispanic Unity Federal
Linder and Mary Hobbs
Scott and Maureen Homan
Horowitz Management
Alan and Shelley Hess
Brian and Nancy Hunsaker
Richard and Regina Hunsaker
Irene Ibarra
Imperial Hotel
Inside the Outdoors Foundation
International Brotherhood of Electrical Workers
Irish Capital
James Irvine Foundation
Irvine Housing Opportunities
J and J Dig Excavation
Catherine Jackson
Mr. and Mrs. Scott Jackson
AI Jacobs
Lamar Jefferson
Gary and Elizabeth Jenkins
Jensen Investment Management
Michael John
Gerald and Bernadette Kanaly
Timothy and Marianne Kay
Michael and Sandra Kehoe
Rick and Anne Keller
James and Leatrice Keller
Christopher Kelly
Donald and Dorothy Kennedy
Russell Kennedy and Anita Varela
Barry Khan and Cheryl Rolapp
Peter and Belinda Kiesecker
Patricia Krone Trust
Mary Lamar
LaPaglia/Sheridan Foundation
Juan and Joanne Lara
William and Dorice Larkin
Carol Latta
Law Offices of Michel and Rhyne
LBA Realty
Leatherby Family Foundation
Regina M. Lehn Charitable Trust
Roberta Lessor
Mitchell and Deena Lew
Maria Linares
Robert and Elizabeth Lindh
Frank and Peggy Listi
Wayne Litman
David Llamas
Arturo and Raquel Lomeli
Warren and Susan Lortie
Jim and Katie Loss
Michael Luevano and Riviera Frost
Arthur and Patricia Lundeen
William J. Lyon
Malcolm and Cisneros, A Law Corporation
Marisla Foundation
Doreen Marshall
Michele Martinez
Paul Marx
Mary’s Shelter
Paula Mathis
Dr. and Mrs. Oscar Matthews
James and Cathleen Matthews
Peter and Helen Maxwell
Winslow Maxwell Charitable Trust
John McClure
Scott and Stephanie McFetters
Lois McMullen
Mendoza Berger and Company
Merage Institute for the American Dream
Merrill Lynch
Ted and Susan Michon
Microsoft Matching Gifts Program
Linda Miller
Robert and Charlotte Minami
Mark and Cherilyn Moehlman
MOMS Orange County
Ethan Morgan
Todd Morrison
Larry and Barbara Mozan
Michael Mugel
Steve Mugg
Gilbert and Florence Mulhere
Edward and Jayne Muñoz
Frances Muñoz
Gregory Muñoz
Donald and Carol Murray
Michael and Linda Mussallem
Kirsten Muster
Steven Myers
NAIOP Socal Chapter
Nasco Gourmet Foods
Carl and Pat Neisser
Bruce Newbery
Niagara Bottling
Nicholas Endowment
Henry T. Nicholas III Foundation
NMC Group
NuFACTOR
Julio and Antoinette Nunez
Timothy and Nancy O’Brien
John and Jeanette O’Connor
Kathleen O’Leary
Edward and Jeanette O’Rourke
Olin Group
OM Restaurant Management
Orange County Bail Agents
Orange County Bail Bonds
Orange County Children and Families Fund
Orange County Employees Association
Orange County Farm Bureau
Orange County United Way
Margaret E. Oser Foundation
Wernher and Rosemary Ovalle
Pacific Life
Greg and Sally Palmer
Parker Hannifin Foundation
Leland Parker
Vytas and Cathy Pazemenas
Todd Pelkey
PF Realty
Jack and Jody Pike
Helen Pines
Pio Pico Elementary School PTA
William and Patricia Podlich
Rodrigo Polanco
Leo and Michelle Presiado
Miguel and Susan Prietto
Public Law Center
Frank and Inez Quevedo
Karen Raab
Brian and Cynthia Ragland
Scott and Susan Redsun
Jerry and Kay Rekers
William Rhodes Foundation
River Road Asset Management
Theodore and Virginia Robins
James and Barbara Rogers
Thomas and Carrie Rolpes
Roman Catholic Bishop of Orange
Jeff Roos
Roosters Foundation of Orange County
Edward and Dana Rossi
Mary Rourke
Mike Rubin
Safeway
Samueli Foundation
Santa Ana College Foundation
Santa Ana High School Wrestling
Santa Ana Police Athletic and Activity League
Santa Ana Police Officers Association
Santa Barbara Foundation
SARES•REGIS Group
Joseph and Debra Schmidt
Alvin and Mary Anne Schoellerman
Schoellerman Foundation
Richard Schoenberger
Tom and Jill Schriber
Science Scholarship Foundation
Daniel and Francine Scinto Foundation
Scott v Bear Communications, Inc.
Robert and Sandra Seat
Security Financial Group
David and Ruth Seigle
Roberto and Cynthia Selva
Edward and Helen Shanbrom
Deane and Johanna Shapiro
Jack Shaw and Ellen Shockro
Sheri Geoffreys Photography
Shulman Hodges and Bastian
John and Carol Sibley
Singgod Foundation
Skyline Charitable Unitrust
Craig and Nancy Smith
Kelly Smith
Solorio for Assembly 2008
Rafael Solorzano
Beatriz Soto
South Santa Ana Merchants Association
Southern California Edison
Southland Industries
Kurt and Betty Spanel
Spectrum Hotel Group
Joshua Speyer
St. Michael’s Abbey
State Farm Mutual Automobile Insurance Company
David and Robyn Stauffer
Elizabeth Steele
John and Mary Stoneman
Mark and Karen Strauss
Susan S. Reese, Design
Keith and Judy Swayne
T.D. Service Company
Ron Tarbell
Laura Tarbox
TCS Radio Group
TEMCOR
Scott and Cheryl Tempel
Gayl Tibbs
TK Foundation
To’ and Mo’ Towing
John and Maxine Todd
Tracy Industries
Tres Estrellas de Oro
Patricia Tucker
Mary Turner
Tustin Public Schools Foundation
Peter and Virginia Ueberroth
Ueberroth Family Foundation
Union Bank of California
United Way of King County
University of California, Irvine
James Updike
Damon and Pamela Vanoostendorp
Angel and Lisa Varela
Ernesto and Socorro Vasquez
Donald Verleur
Vista Metals Corp
Richard and Marcia Vogl
Volunteer Center of Orange County
Jon and Susan Wampler
Waste Management
Ray and Elsa Watson
Melinda Wayne Munoz
Wealth Management Network
Jonathan Webb and Deborah Swett
Wells Fargo Bank
Wells Fargo Foundation
Patricia Wenzel
John Wessel and Judith Herman
Lauren Wessinger
Westend Community Oriented Policing Association
Claire Westmore
Ruth Wetherbee Estate
Robert and Kirsten Whalen
White Family Foundation
Tod and Linda White
Michelle Whiting
Kent and Carol Wilken
James and Joan Wilkie
Karen Winnett
Gregory and Sharon Wohl
Donald and Janet Yeutter
Gordon and Marsha Youde
Zachary’s Chicago Pizza
Murray Zoota
Funds

Endowed Funds

The principal of an endowed fund remains at the Community Foundation forever, and grants and scholarships are made through the fund’s annual earnings. This ensures that a donor’s charitable investment grows and that the community benefits from a continual flow of philanthropy now and for generations to come. We are grateful to those who have committed to care for our community in perpetuity.

Larry Acterman Public Education Fund, Established in Memory of Larry Acterman
AFP Outstanding Youth Leadership Award, Established in Memory of Carol Radzino
Andrews Family Scholarship Fund, Established in Memory of Alan V. Andrews, M.D.
Arts Orange County Endowment Fund
Arts Orange County Imagination Celebration Fund
Beall Family Foundation Endowment Fund
Anna Mary Beck Fund
Frank & Ruth Bila Charitable Fund
E. Burdette and Helen H. Boileau Endowment Fund
Joseph Booth Fund
Nicholas Booth Fund
Sarah Jane Booth Fund
Ryan M. Bousquet Memorial Fund
Bowers Museum of Cultural Art Endowment Fund
Boys & Girls Club of Santa Ana Foundation Fund
Lee Brennan Memorial Scholarship Fund
Bridgford Family Fund
Burzynski Family Fund
Charles B. Caldwell Endowed Fund
Canyon Acres Fund
Case-Swayne Co. Scholarship Fund
Mollie Casey Charitable Fund
Coastline Community College Endowment Fund
Frank & Judy Colver Endowment Fund
Donna & John Crean Endowment Fund
Robert R. Cryer Family Fund
James Santiago Manuel Cuevas Memorial Scholarship Fund
Jane Deming Fund
El Viento Endowment Fund
Excellence in Education Fund
For Good, For Ever Endowment Fund
Frankston Family Fund
Friends of Children’s Museum at La Habra Endowment Fund
Friends of Santa Ana Zoo Endowment Fund
Friendship Shelter Endowment Fund
Fullerton Sunrise Rotary Fund
Giang Family Fund
Goodwill Industries of Orange County Endowment Fund
Joshua Dean Hall Memorial Fund
Julian & Hilda Harte Family Foundation Fund
Mark S. Haunfelner Memorial Fund
Hazeltine Family Educational Fund
Health & Wellness Fund
Healthy Smiles for Kids Fund
Paul E. Heeschen Volunteerism Fund
Jessica Lynn Herman Memorial Scholarship Fund
HomeAid Orange County Endowment Fund
Sean Alan Hoss Endowment Fund
Hostedware Scholarship Fund
Human Options Endowment Fund
Inside the Outdoors Foundation Endowment Fund
James Irvine Endowment Fund
Junior League of Orange County Educational Scholarship Fund
Francis B. Kearns Fund
Kiwanisland Endowment Fund
Doreen D. Marshall Fund for Youth
Mary's Shelter Endowment Fund
Math, Sciences, Arts Scholarship at San Clemente High School Fund
Richard and Jewel May Fund
Arthur Melin Family Fund
James Mock Jr. & Anna Mock Memorial Endowment Fund
MOMS Orange County Fund
Honorable Frances Muñoz Fund
Peter & Mary Muth Endowment Fund
Jim C. Nanscawen Memorial Fund
Clifford & Mary Ann Nelson Educational Fund
New Opportunities for Employment through Retraining Fund
Nick Nicolaus “Seniors” Fund
Nygard Family Endowment Fund
Olander Family Fund
Orange County Arts & Science Education Endowment Fund
Orange County Bar Foundation Endowment Fund
Orange County Centennial Scholarship Fund
Orange County Community Housing Corporation Fund
Orange County Council on Aging Fund
Orange County Endowment Fund
Orange County Hispanic Education Endowment Funds:
Adorno, Yoss, Alvarado & Smith Legal Scholarship Fund
Architecture & Engineering Fund
Arts Scholarship Fund
Association of Hispanic Professionals for Education Scholarship Fund
Richard Bermudez Scholarship Fund/Friends of Cal State Fullerton
Mike Carona Foundation Scholarship Fund
De La Libertad Scholarship Fund
Eisner Foundation Fund
El Viento Endowed Scholarship Fund
Friends of UCI Scholarship Fund
Jose Angel Garibay Scholarship Fund
Healthcare Education Scholarship Fund
Hispanic Bar Association/Wally Davis Memorial Scholarship Fund
Hispanic Chamber of Commerce Scholarship Fund
Hispanic Council of Realtors Fund
Luévano Foundation Fund
MANA of Orange County Scholarship Fund
National Hispanic Business Women Association Fund
New Century Financial Corporation Fund
Henry T. Nicholas III Foundation Fund
Fernando & Olga Niebla Scholarship Fund
Orange County Hispanic Education Endowment Fund
Orange County Register/Excelsior Fund
Orange County United Way Fund
Sage Hill School Scholarship Fund
Soka University Scholarship Fund
Southern California College of Optometry Fund
Union Bank of California Hispanic Scholarship Fund
Vanguard University Scholarship Fund
Angel & Rosemary Varela Scholarship Fund
Orangewood Foundation Endowment Fund
Margaret E. Oser Fund for Women
Virginia Eros Perez Memorial Fund
Recovery Fund
Honorable Thomas F. Riley Fund
Dr. Olivia de la Rocha Endowment Fund
Richard & Mary Rogers Fund
David & Estelle Rosenthal Fund
Rotary Club of Fullerton South Fund
Santa Ana 2000 Scholarship Fund
Second Harvest Endowment Fund
Seigle Family Fund
David C. Seigle Legacy Fund
Frank Morio Shimazu Endowed Memorial Scholarship Fund
Georgia Hull Spooner Performing Arts Juniors Scholarship Fund
South County Senior Services Endowment Fund
Elizabeth & John Stahr Endowment Fund
Robert F. Stauffer Foundation Fund
Stepping Up Endowment Fund
Stone Family Foundation Fund
Swayne Family Memorial Fund
Judith Swayne Leadership Endowment Fund
Temple Beth Shalom Endowment Fund
Connor Jeffrey Thomas Fund
Riley Peter Thomas Fund
Joseph Peter Ueberroth Fund
Matthew Joseph Ueberroth Fund
William Victor Ueberroth Fund
William Van Haeren Memorial Fund
Hillary Glenn Van Ness Endowed Fund
Jillian Marie Van Ness Endowed Fund
Veterans Relief Endowment Fund
Richard and Marcia Vogl Fund
James L. Warner Educational Fund
Webb-Swett Art & Architecture Scholarship Fund
Robert E. and Gladys G. Wilkins Charitable Fund
Barbara Steele Williams Endowment Fund
Dick Wilson Memorial Fund
Charles H. & Ethel E. Wolfe Scholarship Endowment Fund
Zoota Family Endowment Fund

Non-Endowed Funds
A non-endowed fund provides grants and scholarships from the fund’s principal as well as its earnings. These funds help meet the immediate needs of our community.

Kayla L. Aasgard Scholarship Fund, Established in memory of Kayla L. Aasgard
Advisors of Sperry Van Ness Legacy Foundation Fund
Dick & Mary Allen Fund
ALM Fund
Mr. & Mrs. David W. Anderson Fund
Samuel Anderson Family Foundation Fund
AVID Scholarship Fund
Bagne Family Fund
Bailey Charitable Fund
Balboa Performing Arts Theater Fund
Baughman Family Foundation Fund
Beall Family Foundation Fund
Beautiful Boy Fund
Beckman Family Fund
Stanley Behrens Foundation Fund
Belling Family Foundation Fund
John & Linda Benner Fund
Richard & Hyla Bertea Fund
E C Boden Family Foundation Fund
Brain Injury Foundation Fund
Brakke Family Foundation Fund
Elizabeth A. Brem Memorial Fund
Brigham Family Fund
Serena Brooke Fund
Building Block Foundation Fund
Burzynski Family Fund II
Terry & Bonnie Cairy Family Fund
Ellen & Stan Call Family Fund
Campbell Family Fund
David P. Campbell Foundation for Pediatric Mitochondrial Disease Research Fund
Michael & Etta Cannon Family Fund
Carroll Family Foundation Fund
Daniel Cavanagh Journalism Scholarship Fund
Charles D. Cencibaugh Foundation Fund
Chaix/Bush Family Fund
Charter School Development Fund
Child Family for Christ Fund
Victoria & David Collins Family Fund
Control Research Foundation Fund

Cultural Vision Fund
Cvengros Family Charitable Fund
Dad’s House Foundation Fund
Barbara Danzi Fund
Michael Danzi Fund
Lilian M. Davies Movement Education Fund
Davis Development Foundation Fund
Deemer Family Fund
DEER Fund
Denham Family Fund
Disney VoluntEARS Community Fund
Disneyland Resort Scholarship Fund
Dollars for Diablos Fund
Pat and Paula Donahue Family Foundation Fund
Downs-Pike Fund
J. A. Doyle Fund
Draper Family Foundation Fund
Draper Family Foundation Scholarship Fund
Dream Island Fund
Ben & Carmela Du Family Foundation Fund
Robert C. and Lillian N. DuSoe Scholarship Fund
Education Dreams Fund
Faye Edmundson Memorial Fund
Marta K. Egan Scholarship Fund
EHG Fund
El Rancho Charter School Foundation Fund
Kris & Linda Effmannot Family Foundation Fund
Elliott Family Foundation Fund
Brad Evans Foundation Fund, Established in memory of Brad Evans
Dolores Eyler Fund
John Eyler Fund
Falling Leaves Return to Their Roots Fund
FEDCO Teacher Grant Fund
Thomas M. Flynn Jr. Foundation for Positive Futures Fund
Follow the Light Foundation Fund
Catherine Frandsen and Family Fund
Friends of the Orange County Animal Shelter Fund
Robert & Susan Fry Donor Advised Fund
R. and V. Gallio Family Foundation Fund
George & Bob Fund
Darlene & Walter B. Gerken Fund
SL Gimbel Foundation Fund
Paige Gleeson Memorial Fund
Fred & Jeanne Golding Fund
Robert & Terri Goldmann Foundation Fund
Funds (Continued)

Goodwill Industries of Orange County Fund
Daniel C. & Lisa A. Grable Family Foundation Fund
Grants for Blocks – City of Santa Ana Agency Fund
Grants for Parks – City of Santa Ana Agency Fund
George & Reva Graziano Foundation Fund
Green Family Fund
GreenbergGraham Advisors Charitable Fund
Guided Alliance Hemophilia Educational Scholarship Fund
Scott & Anita Hadley Fund
Hagestad Family Foundation Fund
Joshua Dean Hall Memorial Scholarship Fund
Hamilton Family Fund
Lee & Kathy Hancock Fund
Jeanette Bertea Hennings Foundation Fund
Hillgren Family Foundation Fund
Charlie & Mary Hobbs Fund
Johanna May & George Hoedinghaus Fund
James Howard Hoiles Memorial Fund
Homan Family Fund
Hoops Family Fund
Hope for a Future Fund
Hope Fund
Horowitz Family Fund
Andrew & Pamela Horowitz Fund
Michael A. Hunter Memorial Scholarship Fund
Hussman Family Fund
I Give for Kids Fund
Invest in Children Fund
James Irvine Foundation California Advancing the Arts Initiative Fund
Jackson Family Foundation Fund
Jackson Family Scholarship Fund for Nursing
Javed Family Charitable Fund
Howard & Shirley Jones Fund
Joyful Child Foundation Fund in the Memory of Samantha Runnion
Karlshoej and Egan Fund
Sue & Helen Kay Family Fund
Elaine Lucas Keck Foundation Fund
Hunter Keck Family Fund
Dennis & Joanne Keith Fund
Keller Family Fund
Klitmann Family Fund
Kozel Family Fund
Jason Kramer Memorial Fund
Patricia Krone Fund
Laguna Legacy Fund
Jack M. Langson Fund
LaPaglia-Sheridan Foundation Fund
Lara Family Fund
Larkin Family Foundation Fund
Steve & Virginia Layton Family Foundation Fund
LBA Realty Charitable Foundation Fund
Regina M. Lehn Fund
Beatrice Levin Scholarship Fund
Amanda Lew Charitable Foundation Fund
Frank & Peggy Listi Fund
Longhurst Family Foundation Fund
Lortie Family Charitable Fund
Loss Family Fund
Lundeen Family Fund
Marcia & Hank Fund
Marisla Fund
Mathis Family Fund
Richard and Jewel May Scholarship Fund
Anna Grace McGregor OC Fund
Liam James McGregor OC Fund
Rob & Helen McMillin Fund
Melin Family Foundation Fund
Michel-Rhyne Family Foundation Fund
Laura Minami Memorial Fund
Miracle Foundation Fund
Mount Family Fund
Donald & Carol Murray Charitable Fund
Muth Families ORCO Block Fund
Stephanie Muth Foundation Fund
Veronica Muth Foundation Fund
Megan Myers Memorial Fund
Megan Myers Memorial Scholarship Fund
Steven S. Myers Foundation Fund
Nicholas Endowment Fund
Albert & Tricia Nichols Fund
Thomas & Marilyn Nielsen Fund
Noble Family Foundation Fund
Nonprofit Shared Spaces Fund
On Purpose Scholarship Fund
Orange County & Inland Empire Public Interest Green Fund
Orange County Children & Families Fund
Orange County Disaster Relief Fund
Orange County Hispanic Education Funds:
  Chapman University Scholarship Fund
  Orange County Hispanic Education Fund
Orange County Leadership Fund
Orange County Marine Corps Memorial Foundation Fund
Orange County Public Schools Fund
Orange County Scholarship Fund
Orange County Tourism Council Scholarship Fund
O’Rourke Family Foundation Fund
Margaret E. Oser Scholarship Fund

OCCF Board member Paul Heeschen with Tod and Linda White
Bill Cvengros and James Littlejohn, Executive Director of the Boys & Girls Clubs of Capistrano Valley
Ginny Ueberroth and OCCF Board member Vicki Booth
Overseas Chinese Association Scholarship Fund
Palmer Family Foundation Fund
Leland A. Parker Charitable Trust Fund
Camden Partridge Foundation Fund
Cassondra Partridge Foundation Fund
Pines Family Foundation Fund
Podlich Family Fund
Steve and Barbara Polito Foundation Fund
Purcell Family Fund
Rauth Family Fund
RoadTripNation.org Fund
Jeff Roos Foundation Fund
San Clemente History, Arts & Culture Fund
Santa Ana Police Athletic & Activity League Fund
Sawyer Family Foundation Fund
Schmidt Family Foundation Fund
Donald L. Schoellerman Charitable Fund
Schoellerman Family Fund
Jack & Mary Jane Schrader Fund
Schriber Family Fund
Science Scholarship Fund
Daniel and Francine Scinto Foundation Fund
Seed the Change Fund
D.R. Segal Memorial Fund for Excellence in Journalism
David & Ruth Seigle Family Fund
Senior Santas & Friends Fund
Shafer Family Foundation Fund
Edward & Helen Shanbrom Family Fund
Shapiro Family Foundation Fund
Skyline Nevada Fund
Kelly Smith Fund
Vincent & Kelly Smith Fund
Social Enterprise Loan Fund
Social Enterprise Venture Fund
Soka University Fund
Southland Scholarship Fund
St. Joachim Building the Future Fund
Nancy & Geoffrey Stack Family Foundation Fund
Richard & Elizabeth Steele Fund
Steffy Family Foundation Fund
Stephen Family Charitable Fund
Stiepel Family Fund
Swayne Family Charitable Fund
Keith & Judy Swayne Charitable Fund
Sue Pharris Tallman Fund
Don & Betsy Tarbell Fund
Team MacPherson Scholarship Fund
Nancy E. & William S. Thompson Family Fund
Mark Tiner Foundation Fund
TK Foundation Fund
Torres Family Fund
Cheryl & Benjamin Trosky Fund
Turner Family Foundation Fund
Turner Foundation Fund
Ginny & Peter Ueberroth Fund
Unrestricted Non-Endowed Fund
USC-CHOC-Healthy Smiles Pediatric Dental Residency Fund
Van Ness Fund
Familia Vasquez Fund
Robert D. Voit Fund
Ray & Elsa Watson Fund
Wealth Management Network Charitable Foundation Fund

JT Weiss Family Foundation Fund
Wells Family Foundation Fund
Ruth D. Wetherbee Foundation Fund
Whalen Family Fund
Whalen/Zanton Family Fund
Linda and Tod White Charitable Fund
Kent J. & Carol L. Wilken Fund
Robert & Tracey Williams Family Foundation Fund
Whang Family Fund
Karen Winnett Charitable Giving Fund
The Wish Fund
Wohl Family Fund
Yard House Round It Up America Fund
YMCA Health and Fitness Fund
Zoota Family Foundation Fund

Supporting Organizations
Supporting Organizations are separate legal entities that share the 501(c)(3) status of the Community Foundation and are associated with us through both their purposes and their operations.

The Beall Family Foundation
The Elliott Family Foundation
The Nicholas Endowment
Orange County Shared Spaces Foundation
OCCF Supporting Organization
Schoellerman Foundation
The Orange County Community Foundation’s Board of Governors is responsible for prudent asset management. The Board establishes guidelines for the investment portfolio, approves allocation of assets and reviews quarterly performance.

The Investment Committee carries out the Board’s directives relative to investment strategy with the support of an independent investment consultant, Beacon Pointe Advisors, headquartered in Newport Beach. Beacon Pointe has both institutional and individual clients across the nation, including a number of community foundations. Beacon Pointe assists with the evaluation of investment managers and ensures that the funds are managed in the most prudent and effective manner possible.

The careful management of OCCF’s assets is designed to ensure a total return (yield plus capital appreciation) necessary to preserve and enhance the value of the investment pool over time. OCCF’s funds are invested to provide safety through diversification in a portfolio of common stocks, bonds, mutual funds and other investments.

Investments are also diversified within asset classes (for example, equities are diversified by economic sector, industry, quality and size). Portfolio diversification provides protection against a single security or class of securities having a disproportionate impact on aggregate performance.

Investment Managers

**Large Cap Value**
- Dodge & Cox Stock Fund
- MainStay ICAP Equity Fund

**Large Cap Growth**
- Harbór Capital Appreciation Fund
- Jensen Investment Management

**Small Cap Value**
- River Road Asset Management

**International Equity**
- Columbia International Value Fund
- Dodge & Cox International Stock Fund
- EuroPacific Growth Fund
- Virtus Emerging Markets Opportunities Fund

**Fixed Income**
- PIMCO Total Return Fund
- Western Asset Core Plus Fund

**Alternative Investments**
- E.I.I. Global Property Institutional Fund
- HRJ Global Real Estate
- Portfolio Advisor Private Equity

**Custodian**
- First American Trust

**Investment Committee**
- Paul C. Heeschen, Chair
  - Managing Partner, Heeschen & Associates
  - OCCF Board Member
- Jeffrey A. Dankberg
  - Partner, Deloitte LLP
  - OCCF Board Member
- Hyla Bertea
  - Former Director, Sempra Energy
  - OCCF Advisory Board
- Richard Gadbois
  - President, Mullin Asset Management
- Timothy J. Kay
  - Partner, Snell & Wilmer
  - OCCF Board Member
- Andrew Policano
  - Dean, The Paul Merage School of Business
  - University of California, Irvine
- Michael Rakestraw
  - Private Investor
Independent Auditor’s Report

Board of Governors
Orange County Community Foundation

We have audited the accompanying consolidated statement of financial position of the Orange County Community Foundation as of June 30, 2009, and the related consolidated statements of activities and changes in net assets, and cash flows for the year then ended. These financial statements are the responsibility of the Orange County Community Foundation’s management. Our responsibility is to express an opinion on these financial statements based on our audit. The prior year summarized comparative information has been derived from the Orange County Community Foundation’s June 30, 2008 consolidated financial statements and, in our report dated October 1, 2008, we expressed an unqualified opinion on those financial statements.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Orange County Community Foundation’s internal control over financial reporting. Accordingly, we express no such opinion. An audit also includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of the Orange County Community Foundation at June 30, 2009, and the changes in their net assets and their cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Moss Adams LLP
San Diego, California
October 2, 2009
# Consolidated Statement of Financial Position

**June 30, 2009**  
(With Summarized Financial Information for June 30, 2008)

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents <em>(Note 3)</em></td>
<td>$18,955,000</td>
<td>$ 518,000</td>
<td>$ 3,500,000</td>
<td>$22,973,000</td>
<td>$25,399,000</td>
</tr>
<tr>
<td>Investments <em>(Notes 3 and 4)</em></td>
<td>39,220,000</td>
<td>173,000</td>
<td>37,428,000</td>
<td>76,821,000</td>
<td>92,710,000</td>
</tr>
<tr>
<td>Contributions receivable <em>(Note 5)</em></td>
<td>69,000</td>
<td>206,000</td>
<td>437,000</td>
<td>712,000</td>
<td>4,106,000</td>
</tr>
<tr>
<td>Office equipment, net of accumulated depreciation of $88,000 and $58,000 in 2009 and 2008, respectively</td>
<td>119,000</td>
<td>—</td>
<td>—</td>
<td>119,000</td>
<td>149,000</td>
</tr>
<tr>
<td>Other assets</td>
<td>777,000</td>
<td>—</td>
<td>—</td>
<td>777,000</td>
<td>834,000</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$59,140,000</td>
<td>$ 897,000</td>
<td>$41,365,000</td>
<td>$101,402,000</td>
<td>$123,198,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Liabilities</strong>:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants payable</td>
<td>$ 2,996,000</td>
<td>$ —</td>
<td>$ —</td>
<td>$ 2,996,000</td>
<td>$ 2,735,000</td>
</tr>
<tr>
<td>Pledges payable <em>(Note 6)</em></td>
<td>3,555,000</td>
<td>—</td>
<td>—</td>
<td>3,555,000</td>
<td>4,353,000</td>
</tr>
<tr>
<td>Accounts payable and accrued liabilities</td>
<td>384,000</td>
<td>—</td>
<td>—</td>
<td>384,000</td>
<td>500,000</td>
</tr>
<tr>
<td>Due to other agencies</td>
<td>876,000</td>
<td>—</td>
<td>—</td>
<td>876,000</td>
<td>835,000</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>7,811,000</td>
<td>—</td>
<td>—</td>
<td>7,811,000</td>
<td>8,423,000</td>
</tr>
</tbody>
</table>

|                    |             |                        |                        |             |             |
| **NET ASSETS**:     |             |                        |                        |             |             |
| Unrestricted        | 51,329,000  | —                      | —                      | 51,329,000  | 75,977,000  |
| Temporarily restricted | —          | 897,000                | —                      | 897,000     | 428,000     |
| Permanently restricted *(Note 7)* | — | —                      | 41,365,000             | 41,365,000  | 38,370,000  |
| **Total NET ASSETS** | 51,329,000  | 897,000                | 41,365,000             | 93,591,000  | 114,775,000 |

| **Total Liabilities and Net Assets** | $59,140,000 | $ 897,000 | $41,365,000 | $101,402,000 | $123,198,000 |

*See accompanying notes to financial statements.*
## Consolidated Statement of Activities and Changes in Net Assets

**Year Ended June 30, 2009**

(With Summarized Financial Information for the Year Ended June 30, 2008)

<table>
<thead>
<tr>
<th></th>
<th>2009 Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
<th>2008 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue and Support</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$ 18,450,000</td>
<td>$ —</td>
<td>$ 2,089,000</td>
<td>$ 20,539,000</td>
<td>$ 36,185,000</td>
</tr>
<tr>
<td>Investment income (Note 4)</td>
<td>(17,545,000)</td>
<td>507,000</td>
<td>—</td>
<td>(17,038,000)</td>
<td>(5,167,000)</td>
</tr>
<tr>
<td><strong>Total revenue and support prior to net assets released from restrictions</strong></td>
<td>905,000</td>
<td>507,000</td>
<td>2,089,000</td>
<td>3,501,000</td>
<td>31,018,000</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>153,000</td>
<td>(49,000)</td>
<td>(104,000)</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td><strong>Total Revenue and Support</strong></td>
<td>1,058,000</td>
<td>458,000</td>
<td>1,985,000</td>
<td>3,501,000</td>
<td>31,018,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Expenses</strong></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PROGRAM SERVICES:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants and scholarships</td>
<td>21,272,000</td>
<td>—</td>
<td>—</td>
<td>21,272,000</td>
<td>20,300,000</td>
</tr>
<tr>
<td>Special projects</td>
<td>834,000</td>
<td>—</td>
<td>—</td>
<td>834,000</td>
<td>564,000</td>
</tr>
<tr>
<td>Other program expenses</td>
<td>1,017,000</td>
<td>—</td>
<td>—</td>
<td>1,017,000</td>
<td>974,000</td>
</tr>
<tr>
<td><strong>Total program services</strong></td>
<td>23,123,000</td>
<td>—</td>
<td>—</td>
<td>23,123,000</td>
<td>21,838,000</td>
</tr>
<tr>
<td><strong>SUPPORTING SERVICES:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General and administrative</td>
<td>814,000</td>
<td>—</td>
<td>—</td>
<td>814,000</td>
<td>806,000</td>
</tr>
<tr>
<td>Development</td>
<td>748,000</td>
<td>—</td>
<td>—</td>
<td>748,000</td>
<td>742,000</td>
</tr>
<tr>
<td><strong>Total supporting services</strong></td>
<td>1,562,000</td>
<td>—</td>
<td>—</td>
<td>1,562,000</td>
<td>1,548,000</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>24,685,000</td>
<td>—</td>
<td>—</td>
<td>24,685,000</td>
<td>23,386,000</td>
</tr>
</tbody>
</table>

| **CHANGE IN NET ASSETS BEFORE RECLASSIFICATION AND TRANSFERS** |       |        |        |       |            |
| (23,627,000) | 458,000 | 1,985,000 | (21,184,000) | 7,632,000 |
| **Reclassification and transfers** | (1,021,000) | 11,000 | 1,010,000 | — | — |
| **CHANGE IN NET ASSETS** | (24,648,000) | 469,000 | 2,995,000 | (21,184,000) | 7,632,000 |

| **Net Assets** |       |        |        |       |            |
| BEGINNING OF YEAR | 75,977,000 | 428,000 | 38,370,000 | 114,775,000 | 107,143,000 |
| END OF YEAR | $ 51,329,000 | $897,000 | $41,365,000 | $ 93,591,000 | $114,775,000 |

See accompanying notes to financial statements.
## Consolidated Statement of Cash Flows

**Year Ended June 30, 2009**  
(With Comparative Amounts for the Year Ended June 30, 2008)

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$(21,184,000)</td>
<td>$  7,632,000</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash used in operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation</td>
<td>32,000</td>
<td>11,000</td>
</tr>
<tr>
<td>Net realized and unrealized losses on investments</td>
<td>20,889,000</td>
<td>8,304,000</td>
</tr>
<tr>
<td>Non-cash contributions of stock and property</td>
<td>(1,469,000)</td>
<td>(10,115,000)</td>
</tr>
<tr>
<td>Contributions restricted for long-term investment</td>
<td>(1,985,000)</td>
<td>(7,624,000)</td>
</tr>
<tr>
<td>Changes in operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>3,394,000</td>
<td>(3,956,000)</td>
</tr>
<tr>
<td>Other assets</td>
<td>57,000</td>
<td>(80,000)</td>
</tr>
<tr>
<td>Grants payable</td>
<td>261,000</td>
<td>253,000</td>
</tr>
<tr>
<td>Pledges payable</td>
<td>(798,000)</td>
<td>(277,000)</td>
</tr>
<tr>
<td>Accounts payable and accrued liabilities</td>
<td>(116,000)</td>
<td>173,000</td>
</tr>
<tr>
<td>Due to other agencies</td>
<td>41,000</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>Net cash used in operating activities</strong></td>
<td>$(878,000)</td>
<td>$(5,678,000)</td>
</tr>
</tbody>
</table>

|                           |            |            |
| **Investing Activities**  |            |            |
| Purchases of investments  | (48,267,000) | (46,847,000) |
| Proceeds from sales of investments | 44,736,000 | 31,980,000 |
| Purchases of office equipment | (2,000)   | (134,000)  |
| **Net cash used in investing activities** | $(3,533,000) | $(15,001,000) |

|                           |            |            |
| **Financing Activities**  |            |            |
| Contributions restricted for long-term investment | 1,985,000 | 7,624,000 |

## Decrease in Cash and Cash Equivalents

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning of year</td>
<td>25,399,000</td>
<td>38,454,000</td>
</tr>
<tr>
<td>End of year</td>
<td>$ 22,973,000</td>
<td>$ 25,399,000</td>
</tr>
</tbody>
</table>

## Supplemental Disclosure of Cash Flow Information

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taxes Paid</td>
<td>$ 44,000</td>
<td>$ —</td>
</tr>
</tbody>
</table>

*See accompanying notes to financial statements.*
Notes to Consolidated Financial Statements
June 30, 2009

Note 1 — Description of the Community Foundation
Orange County Community Foundation (the Community Foundation) is a publicly supported, not-for-profit organization incorporated in the State of California in September 1989. The Community Foundation works with donors, strengthens the capacity of local nonprofit organizations and incubates new solutions that address our community’s unmet needs.

The Community Foundation established OCCF Supporting Organization and Orange County Shared Spaces Foundation which are under the Community Foundation’s effective control and are consolidated for financial statement purposes. OCCF Supporting Organization and Orange County Shared Spaces Foundation had no activity during the years ended June 30, 2009 and 2008.

Note 2 — Summary of Significant Accounting Policies
Basis of Presentation — The accompanying consolidated financial statements have been prepared using the accrual basis of accounting. Contributions are reported as increases in unrestricted net assets, unless use of the related assets is limited by donor-imposed restrictions. Expenses are reported as decreases in unrestricted net assets.

Expireations of temporary restrictions on net assets (i.e., the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets.

Cash and Cash Equivalents — The Community Foundation considers all highly liquid instruments purchased with an original maturity of 90 days or less to be cash equivalents.

Description of Net Assets — Contributions of cash and other assets are classified as one of the three categories listed below:

Unrestricted — Net assets are not subject to donor-imposed time restrictions or restrictions as to use. The bylaws of the Community Foundation include a variance provision giving the Board of Governors the power to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to specified organizations if, in the sole judgment of the Board of Governors (without the necessity of approval of the donor), such restriction or condition becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the community or area served. Based on the provision, the Community Foundation classifies contributions, except as noted below, as unrestricted for financial statement purposes.

Temporarily restricted — Net assets subject to donor-imposed time restrictions or restrictions as to use. Temporarily restricted contributions with donor restrictions which are met in the same year have been recorded as unrestricted revenue.

Permanently restricted — Net assets subject to donor-imposed restrictions that the corpus be maintained as a permanent endowment.

Income Taxes — The Community Foundation is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code and Section 23701(d) of the California Code. The Community Foundation is subject to unrelated business taxable income as defined under IRC sections 511 through 515. Unrelated business income tax expense for the fiscal year ending June 30, 2009 was $44,000. There was no unrelated business income tax expense for the year ended June 30, 2008.

In July 2006, the Financial Accounting Standards Board released FASB Interpretation No. 48 (“FIN 48”), Accounting for Uncertainty in Income Taxes — an interpretation of SFAS 109. FIN 48 provides guidance for how uncertain tax positions should be recognized, measured, presented and disclosed in the consolidated financial statements. Persuant to FSP FIN 48-3, management has elected to defer the application of FIN 48 to fiscal years beginning after December 15, 2008. The Community Foundation evaluates uncertain tax positions in accordance with Statement of Financial Accounting
Standards No. 5, Accounting for Contingencies whereby the effect of the uncertainty would be recorded if the outcome was considered probable and reasonably estimable. As of June 30, 2009 and 2008, the Community Foundation had no uncertain tax positions requiring accrual.

Investments — Investments in marketable securities are stated at fair value based on quoted market prices. Investments in real estate are carried at fair value. Investments in real estate partnerships, which are not readily marketable, are carried at their estimated fair values as valued by the general partner of the partnership based on factors deemed relevant by the general partners including, but not limited to, market conditions, purchase price, estimated liquidation value, restrictions on transfer and third party transactions in the private market. Alternative and other investments, which are not readily marketable, are carried at their estimated fair values as provided by the investment managers. The Community Foundation reviews and evaluates the values provided by the investment managers. Realized and unrealized gains and losses are reflected in investment income on the accompanying Consolidated Statement of Activities and Changes in Net Assets.

Contributions Receivable — Contributions receivable consist of unconditional promises to give. Unconditional promises to give that are expected to be collected in future years are recorded at fair value when the promise is made based on anticipated discounted cash flows. In future years, the discounts to present value are computed using discount rates established in the years in which those promises are received. Amortization of the discounts is included in contributions. Conditional promises to give are not recorded until the conditions are substantially met.

Office Equipment — Office equipment is stated at cost. Office equipment purchased at a cost of $1,000 or more is capitalized. Depreciation has been provided using the straight-line method over the estimated useful life of five years.

Due to Other Agencies — Due to other agencies represents monies received from other not-for-profit organizations whereby the income or gains earned are for the benefit of the donor organization.

Special Projects — Special projects expense represents charitable activities managed by the Community Foundation often on behalf of donors who request that the Community Foundation exercise a heightened level of oversight regarding expenditures.

Functional Expense Allocations — Expenses, which apply to more than one functional category, have been allocated between program, general and administrative, and development based on the time spent on these functions by specific employees as estimated by senior management. The remaining costs are charged directly to the appropriate functional category.

Use of Estimates — The preparation of the consolidated financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, and disclosure of contingent assets and liabilities at the date of the consolidated financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

Prior-year Information — The consolidated financial statements include certain prior-year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with the Community Foundation’s consolidated financial statements for the year ended June 30, 2008, from which the summarized information was derived. Certain reclassifications have been made to the 2008 consolidated financial statements to conform with the 2009 presentation. The reclassifications have no effect on the consolidated change in net assets or net assets.
Subsequent Events — Subsequent events are events or transactions that occur after the consolidated statement of financial position date but before financial statements are issued. The Foundation recognizes in the consolidated financial statements the effects of all subsequent events that provide additional evidence about conditions that existed at the date of the consolidated statement of financial position, including the estimates inherent in the process of preparing the consolidated financial statements. The Foundation’s consolidated financial statements do not recognize subsequent events that provide evidence about conditions that did not exist at the date of the consolidated statement of financial position but arose after the consolidated statement of financial position date and before financial statements are available to be issued. The Foundation has evaluated subsequent events through October 2, 2009, which is the date the consolidated financial statements are issued.

Note 3 - Concentrations of Risk
Cash Equivalents — In the regular course of business, the Community Foundation may maintain balances at a bank in excess of the federally insured limits. The Community Foundation has not experienced any losses in such accounts.

Investments — Investments are exposed to various risks, such as interest rates, market and credit risk. It is at least reasonably possible given the level or risk associated with investments that changes in the near term could materially affect the amounts reported in the consolidated financial statements. Investments are managed by third parties to diversify risk and manage liquidity.

Major Contributions — For the fiscal year ended June 30, 2009 and 2008, 34% of contributions were received from two donors and 34% from three donors, respectively.

Note 4 - Investments and Fair Value Disclosures
The Community Foundation provides donor advisors with the choice of allocating their fund between the investment pool and the cash pool based upon their cash needs for granting to charities. In addition, funds which have over $1 million in assets may be invested separately from the pools, subject to approval by the Community Foundation’s Investment Committee.

Investments at fair value consist of the following at June 30:

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed income funds</td>
<td>$22,761,000</td>
<td>$23,114,000</td>
</tr>
<tr>
<td>Marketable equity securities</td>
<td>11,574,000</td>
<td>15,813,000</td>
</tr>
<tr>
<td>Mutual funds equities</td>
<td>38,173,000</td>
<td>48,158,000</td>
</tr>
<tr>
<td>Real estate and real estate partnerships</td>
<td>712,000</td>
<td>2,362,000</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>3,601,000</td>
<td>3,263,000</td>
</tr>
<tr>
<td><strong>Total investments</strong></td>
<td><strong>$76,821,000</strong></td>
<td><strong>$92,710,000</strong></td>
</tr>
</tbody>
</table>

Alternative investments are less liquid than the Community Foundation’s other investments. The Community Foundation’s investment policy is to maximize return with a minimal amount of risk. The use of alternative investments furthers that objective. The Community Foundation has agreements to make future investments in such funds. These agreements expire through December 31, 2010. As of June 30, 2009, commitments related to these agreements totaled $1,434,000.

Investment loss consists of the following for the years ended June 30:

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net realized and unrealized losses</td>
<td>$(20,889,000)</td>
<td>$(8,304,000)</td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>3,851,000</td>
<td>3,137,000</td>
</tr>
<tr>
<td><strong>Total investment loss</strong></td>
<td><strong>$(17,038,000)</strong></td>
<td><strong>$(5,167,000)</strong></td>
</tr>
</tbody>
</table>

framework for measuring fair value, and expands disclosures about fair value measurements. FAS 157 has been applied prospectively as of the beginning of fiscal year 2009.

FAS 157 defines fair value as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. FAS 157 also establishes a fair value hierarchy which requires an entity to maximize the use of observable inputs and minimize the use of unobservable inputs when measuring fair value. The standard describes three levels of inputs that may be used to measure fair value:

Level 1 — Quoted prices in active markets for identical assets or liabilities;

Level 2 — Observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities; quoted prices in active markets that are not active; or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities; and

Level 3 — Unobservable inputs that are supported by little or no market activity and that are significant to the fair value of the assets or liabilities.

See Note 2 for the valuation methodologies used for assets measured at fair value on a recurring basis and recognized in the accompanying consolidated statements of financial position.

The following fair value hierarchy table presents information about each major category of the Community Foundation’s financial assets measured at fair value on a recurring basis as of June 30, 2009:

<table>
<thead>
<tr>
<th>Balance as of June 30, 2009</th>
<th>(Level 1)</th>
<th>(Level 2)</th>
<th>(Level 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total investments</td>
<td>$72,508,000</td>
<td>$678,000</td>
<td>$3,635,000</td>
</tr>
<tr>
<td>Total</td>
<td>$76,821,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following table discloses the summary of changes in the fair value of the Community Foundation’s Level 3 investments:

<table>
<thead>
<tr>
<th></th>
<th>Real Estate and Real Estate Partnerships</th>
<th>Alternative Investments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance June 30, 2008</td>
<td>$2,362,000</td>
<td>$2,413,000</td>
<td>$4,775,000</td>
</tr>
<tr>
<td>Realized and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>unrealized losses</td>
<td>(1,650,000)</td>
<td>(814,000)</td>
<td>(2,464,000)</td>
</tr>
<tr>
<td>Purchases</td>
<td></td>
<td>1,324,000</td>
<td>1,324,000</td>
</tr>
<tr>
<td>Balance June 30, 2009</td>
<td>$712,000</td>
<td>$2,923,000</td>
<td>$3,635,000</td>
</tr>
</tbody>
</table>

Unrealized losses relating to Level 3 investments still held at year-end totaled $2,475,000 for the year ended June 30, 2009, and are reflected in investment income on the Consolidated Statement of Activities and Changes in Net Assets.

Note 5 - Contributions Receivable

Contributions receivable, net of discount, represent unconditional promises to give to the Community Foundation that remain uncollected at year-end and are expected to be collected as follows at June 30, 2009:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$374,000</td>
</tr>
<tr>
<td>Two to five years</td>
<td>132,000</td>
</tr>
<tr>
<td>More than five years</td>
<td>206,000</td>
</tr>
<tr>
<td>Total contributions receivable</td>
<td>$712,000</td>
</tr>
</tbody>
</table>

Note 6 - Pledges Payable

Pledges payable at June 30, 2009 consist of approved grant commitments that are expected to be paid during the following years:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Years ending June 30,</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>$1,429,000</td>
</tr>
<tr>
<td>2011</td>
<td>1,597,000</td>
</tr>
<tr>
<td>2012</td>
<td>512,000</td>
</tr>
<tr>
<td>2013</td>
<td>110,000</td>
</tr>
<tr>
<td></td>
<td>3,648,000</td>
</tr>
<tr>
<td>Discount</td>
<td>(93,000)</td>
</tr>
<tr>
<td>Net pledges payable</td>
<td>$3,555,000</td>
</tr>
</tbody>
</table>
The pledges have been discounted to net present value using a risk free rate of return determined at year of origination of the pledge.

Note 7 - Endowments
Effective July 1, 2008, the Community Foundation adopted Statement of Financial Accounting Standards Staff Position No. FAS 117-1, Endowments of Not-for-Profit Organizations, by implementing a policy requiring the preservation of the fair value of the original gift or corpus as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result, the Community Foundation classifies as permanently restricted net assets (a) the original value of gifts donated to the permanent endowment (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure in a manner consistent with a standard of prudence. The Community Foundation considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds: (1) The duration and preservation of the funds, (2) The purposes of the donor-restricted endowment funds, (3) General economic conditions, (4) The possible effect of inflation and deflation, (5) The expected total return from income and the appreciation of investments.

The Community Foundation has investment and spending policies for endowment assets that attempt to provide a predictable stream of funding for operations and granting. Endowment assets include those assets of donor-restricted funds that the Community Foundation must hold in perpetuity. Under the investment policy, as approved by the Board of Governors, the endowment assets are invested in a manner which attempts to achieve, after fees and expenses, a reasonable rate of return consistent with the risk levels established by the Investment Committee for all permanently restricted endowment assets. To satisfy its long-term rate-of-return objectives, the Community Foundation relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Community Foundation targets a diversified asset allocation primarily focused on equity and fixed income based investments to achieve its long-term return objectives within prudent risk constraints.

The State of California enacted the Uniform Prudent Management of Institutional Funds Act of 2006 (UPMIFA) effective January 1, 2009, the provisions of which apply to endowment funds existing at the time of or established after that date. The Community Foundation’s permanently restricted net assets meet the definition of endowment funds under UPMIFA and the Community Foundation has reclassified $11,000 from unrestricted net assets to temporarily restricted net assets as of January 1, 2009.

The Community Foundation has a policy of appropriating for distribution as of January 1st of each year five percent of its endowment fund’s average fair value over the prior twelve quarters. In establishing this policy, the Community Foundation considered the long-term expected return on its endowment. Accordingly, over the long term, the Community Foundation expects the current spending policy to allow its endowment to maintain the purchasing power of the endowment assets held in perpetuity.

At June 30, 2009 the accumulated gains/losses of the endowment fund resulted in a negative balance of approximately $4 million and this amount is reported in unrestricted net assets. These deficiencies resulted from unfavorable market fluctuations, however disbursements from principal are allowed as long as they are deemed to be prudent. The Board of Governors approved disbursements for granting from principal would be allowed up to a maximum of 5% of the December 31, 2008 balance, unless otherwise specified in the governing fund agreement.
Changes in endowment net assets are as follows:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endowment net assets June 30, 2008</td>
<td>$ 7,598,000</td>
<td>$173,000</td>
<td>$38,370,000</td>
<td>$46,141,000</td>
</tr>
<tr>
<td>UPMIFA reclassification</td>
<td>(11,000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td></td>
<td>11,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment income (loss):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest income net of fees</td>
<td>1,641,000</td>
<td></td>
<td></td>
<td>1,641,000</td>
</tr>
<tr>
<td>Realized and unrealized gains (losses)</td>
<td>(8,668,000)</td>
<td>507,000</td>
<td></td>
<td>(8,161,000)</td>
</tr>
<tr>
<td>Grants paid</td>
<td>(1,168,000)</td>
<td></td>
<td>(104,000)</td>
<td>(1,272,000)</td>
</tr>
<tr>
<td>Other changes/transfers</td>
<td>(930,000)</td>
<td></td>
<td>1,010,000</td>
<td>80,000</td>
</tr>
<tr>
<td>Endowment net assets June 30, 2009</td>
<td>$(1,538,000)</td>
<td>$691,000</td>
<td>$41,365,000</td>
<td>$40,518,000</td>
</tr>
</tbody>
</table>

Distributions from the grantable amount of endowment funds are identified toward a specific purpose based on instructions from donors when the contributions were received. The specific purposes of permanent endowment are as follows at June 30:

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>$ 3,649,000</td>
<td>$ 3,097,000</td>
</tr>
<tr>
<td>Donor-advised</td>
<td>7,775,000</td>
<td>6,845,000</td>
</tr>
<tr>
<td>Field-of-interest</td>
<td>10,009,000</td>
<td>10,009,000</td>
</tr>
<tr>
<td>Operating</td>
<td>2,951,000</td>
<td>2,550,000</td>
</tr>
<tr>
<td>Scholarships</td>
<td>4,559,000</td>
<td>4,466,000</td>
</tr>
<tr>
<td>Board discretionary</td>
<td>12,422,000</td>
<td>11,403,000</td>
</tr>
<tr>
<td>Total permanently restricted net assets</td>
<td>$41,365,000</td>
<td>$38,370,000</td>
</tr>
</tbody>
</table>

Community Foundation matches up to three percent of the annual compensation of participants. Retirement plan expense for the fiscal years ending June 30, 2009 and 2008 was $37,000 and $32,000, respectively.

**Note 9 - Commitments**

Aggregate future minimum rent payments required under operating leases for office space that have non-cancelable lease terms, in excess of one year at June 30, 2009 are as follows:

<table>
<thead>
<tr>
<th>Years ending June 30,</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$168,000</td>
</tr>
<tr>
<td>2011</td>
<td>29,000</td>
</tr>
<tr>
<td>Total commitments</td>
<td>$197,000</td>
</tr>
</tbody>
</table>

Rent expense for the fiscal years ending June 30, 2009 and 2008 was $165,000 and $162,000, respectively.
**Board Governance**

The Orange County Community Foundation provides donors with careful and diligent stewardship of their philanthropic investments, both during and after their lifetimes. Donors often bequeath gifts to OCCF in their estate plans, entrusting OCCF with the responsibility of carrying out their philanthropic intent after they are gone. Some donors ask OCCF to exercise its discretion to direct the proceeds of their gifts to meet the most pressing community needs as they change over time, while others describe the fields of interest or specific organizations they wish to benefit with their legacy. And, of course, many donors use the Orange County Community Foundation as an active partner in their current giving, helping them to realize the philanthropic impact they could not achieve on their own.

Part of what makes this possible is the reputation earned by OCCF for the honesty, integrity and diligence of its Board of Governors. These characteristics are essential because of the critical stewardship role the Board plays in governing OCCF assets and operations.

The Board exercises its governance responsibilities supported by a committee structure that allows members to apply their skills and expertise in the areas that will ensure most effective oversight and guidance of OCCF’s activities. The following committees meet regularly to carry out critical functions of the Board.

**Finance:** Reviews quarterly financial statements and budget performance, and recommends annual budget to the Board.

**Investment:** Reviews investment performance with its independent investment consultant, ensures compliance with OCCF investment policies and guidelines, proposes modifications to investment policies, and reviews investment implications of unusual assets.

**Audit:** Hires, sets compensation, and oversees the independent auditor’s activities, meets with the auditor and reviews the audited financial statements and recommends their approval to the Board.

**Compensation:** Guides and oversees OCCF’s compensation policies and practices, ensuring compliance with legal and regulatory requirements and alignment with best practice standards.

**Board Governance:** Oversees recruitment, orientation and ongoing education of Board members and ensures that the Board is demonstrating the highest standards of accountability, transparency and fiduciary responsibility in its governance of the Community Foundation.

**Fund Distribution:** Oversees the distribution of OCCF’s discretionary resources within policy guidelines established by the Board and makes recommendations for grant distributions to the Board.

**Endowment Oversight:** Works to ensure that the intentions of donor advisors who are no longer willing or able to serve are carried out. Reviews original fund agreements and recent granting activity and makes recommendations to the Board as needed.
A Legacy of Leadership

Dedicated and results-driven leadership has been the hallmark of the Orange County Community Foundation since 1989. We are governed by a diverse board of citizens that share a passion for philanthropy and decades of experience on corporate and nonprofit boards.

Founding Board
Justice John Arguelles (Ret.) 1989-1996
Janet Colclaser 1989-2000
Bernice Hird 1989-1999
Robert Ihrke Esq. 1989-1999
Gary Johnson 1989-1998
Jim Kanno 1989-1995
Parker Kennedy 1989-2000
Carl Mitchell 1989-1993
Honorable Thomas Riley 1989-1997
Judy Hoiles Threshie 1989-1993
Ginny Ueberroth 1989-1999
Daniel Wheeler 1989-1992
Carol Wilken 1989-2000

Previous Board Members
N. Christian Anderson 2003-2008
K.P. “Bala” Balkrishna 2004-2005
Hyla Bertea 1994-2004
Michael R. Danzi 2001-2007
Ron Dominguez 1990-1992
Walter Gerken 1995-2005
Dr. Milton Gordon 1990-1997
Robert Grant 1994-2004
Lee Hancock 1991-2002
Rose Marie Johnson 1998-1999
Joann Leatherby 1995-1997
Les McCraw 1990-1996
Robert McKay 1992-1999
Honorable Frances Muñoz (Ret.) 2000-2003
Thomas Nielsen 1990-2000
William F. Podlich 1997-2007
Frank Quevedo 1993-1998
Ruben Smith 2000-2004
Judith Swayne 1999-2003

Advisory Board
Comprised of former OCCF Board members and community leaders, these knowledgeable individuals provide their skills and expertise to help guide OCCF’s efforts. We thank them for their enduring, invaluable commitment to OCCF.

Co-Chairs
Thomas Nielsen
Ginny Ueberroth

Members
Marian Bergeson
Hyla Bertea
Janet Colclaser
Robert Ihrke, Esq.
Lee Hancock
Robert Ihrke, Esq.
Joann Leatherby
Marilyn Nielsen
William F. Podlich
Elizabeth Stahr
Carol Wilken

Founder Judith Swayne

Judith Swayne’s vision and unwavering passion for philanthropy were the spark that brought the Orange County Community Foundation to life. After conducting a feasibility study and garnering the support of distinguished business and community leaders, Judy’s dream was realized when OCCF was incorporated in 1989. By the time she retired in 2000, OCCF was recognized as one of the fastest growing community foundations in the nation. Judy’s legacy will live on forever in the heart of the Orange County Community Foundation.
Board of Governors (as of June 30, 2009)

Dick Allen
Chairman
Chairman, Tandem Diabetes Care

Jeffrey A. Dankberg
Vice Chair and Treasurer
Partner, Deloitte LLP

Julie A. Hill
Secretary
Former Chairman and CEO, Costain US

Paul Frederic Marx
Past Chairman
Partner, Rutan & Tucker, LLP

Marcia F. Adler
Chair, Fund Distribution Committee

Samuel D. Anderson
Former CEO, Alpha Therapeutic Corporation

Vicki Booth
President, Ueberroth Family Foundation

Paul C. Heeschen
Managing Partner, Heeschen & Associates

Douglas G. Holte
President, Office Properties
The Irvine Company

Timothy J. Kay
Partner, Snell & Wilmer L.L.P.

Donald P. Kennedy
Chairman Emeritus, The First American Corporation

David C. Seigle
President and Chairman, In-Three

Kelly Smith
Founder, Center for Living Peace

Socorro Vasquez
Board Emerita, St. Joseph’s Ballet