Orange County Community Foundation

2016 ANNUAL REPORT
Our lives are filled with questions, from the mundane to the profound. But as anyone who has spent time with a three-year-old knows, one question tops them all... **WHY?**

**THIS IS THE QUESTION WE’RE ASKING THE DREAMERS AND DOERS MAKING OUR COMMUNITY A PLACE WHERE WE CAN ALL LEARN, GROW AND THRIVE. THEY HAVE DARED TO BELIEVE THAT BY WORKING TOGETHER, WE CAN ALL MAKE A DIFFERENCE.**

In these pages, you will learn why we do what we do at the Orange County Community Foundation. Why Ranney Draper believes that a changed life starts with education. Why Todd Hanson is passionate about helping families turn their philanthropic vision into reality. Why the members of our Board of Governors devote themselves to our work.

They’ve all found their “**WHY**” at the Orange County Community Foundation. Now it’s your turn: What’s **YOUR** Why?
At the Orange County Community Foundation, we believe in the power of philanthropy to unlock the potential of all who call our county home.

**Why?** Because we have the unique privilege of working with the best hearts and minds in Orange County, from passionate philanthropists to visionary CEOs to innovative nonprofit leaders fearlessly tackling the toughest and most entrenched challenges in our community.

Driven by compassion and generosity, they are compelled to make a difference. To lighten a neighbor’s load. To ease the burdens of those struggling for basic survival. To instill hope for children and families living in the margins.

The pages that follow contain stories of those working generously and collaboratively for the good of our community. Of a rising tide that uplifts us all.

The Orange County Community Foundation is honored to play our part in this story. As a steward of donors’ philanthropic visions and their resources, a trusted partner and leader of a growing body of community leadership work, and as a resource for nonprofits working relentlessly in pursuit of their valiant missions, we add our voice to the chorus of hope, of inspiration, and of love for our community.

We witness the transforming power of inspired, thoughtful and well-directed philanthropy every day. Thank you for being part of our story, and for letting us be part of yours.

Doug Holte, **Chairman**
Irvine Company Office Properties

Keith Swayne, **Vice Chairman**
Keith and Judy Swayne Family Foundation

Reshma Block, **Finance Chair**
Compass Consulting

Michael Berchtold, **Secretary**
Berchtold Capital Partners

Vicki Booth, **Past Chair**
Ueberroth Family Foundation

Herbert Bedolfe
Marisla Foundation

Daniel Bolar
Bolar Hirsch & Jennings LLP

DeAnna Colglazier
Community Strategist

Rachid Chamtieh
Deloitte & Touche LLP

Dr. Manuel Gómez
University of California, Irvine

Paul Kagoo
Western Digital Corporation

Dr. Alberto Manetta
UC Irvine School of Medicine

Anoosheh Oskouian
Ship & Shore Environmental, Inc.

Greg Palmer
GPalmer & Associates

Susanna Vakili
Marriage and Family Therapist

**WE BELIEVE**

“People don’t buy what you do; they buy why you do it. And what you do simply proves what you believe.” –Simon Sinek

**BOARD OF GOVERNORS**
BOARD OF GOVERNORS

WHAT'S OUR WHY...
I am well aware that all too many in our country face daunting challenges. I believe I can make a difference in the lives of some and open avenues that will enable them to better their lives. KEITH SWAYNE

The staff at OCCF has a tremendous heart for matching donors with the most appropriate charitable organizations that fit each donor’s philanthropic intentions. The team at OCCF really understands the needs of our community and is focused on leading the way to make Orange County a better place for all — especially the underserved. MIKE BERCHTOLD

I have chosen to be a Board member at OCCF for several reasons. The broad-reaching high impact of OCCF and its many partners is second to none in Orange County. The employees, Board members, and nonprofit partners are truly inspiring. Engaging both the head and the heart in real community needs is so very meaningful. DEANNA COLGLAZIER

OCCF represents the power of convening the corporate world, nonprofits and influencers to exponentially drive impact and social innovation in the community. Being part of OCCF allows me the opportunity to team with some great leaders in our community as we look to continue to make an impact in our community. RACHID CHAMTIEH

Giving back is very important to me because of all the benefits this beautiful country has afforded me, and the generous culture that has allowed me to prosper and succeed. I am a Naturalized Citizen and have contributed wherever I could to the less fortunate in our community. The process of “Giving” provides me with an additional purpose to my life. DR. ALBERTO MANETTA

We have chosen OCCF because it’s the gold standard in Orange County to help us make the biggest impact in our community. OCCF has helped us understand our options and they continuously help us follow through in a direct and impactful way that we could not have done without their guidance and ongoing support. GREG PALMER

OCCF is my connection to Orange County, from the grassroots level up to decision-makers; and OCCF is dedicated to bringing the community together and making a positive difference. HERBERT BEDOLFE

I simply think it’s the right thing to do, and the rewards I have received over the years are far greater than what I have given. DAN BOLAR

A life is not worth living if you haven’t impacted another life in a positive way. This is why I strive to give and do as much as I can which is never enough, but an action in the right direction. ANOOSHE OSKOUIAN

I am forever grateful to the strangers, who so long ago, expressed confidence in my abilities by awarding me a scholarship to attend college. The true worth of their help resides in the larger cycle of giving and receiving they initiated. DR. MANUEL GÓMEZ

My parents, who are immigrants and refugees, instilled in me a sense of how very fortunate we are to live in this country. Giving back is my way of living that sense of gratitude. SUSANNA VAKILI

The Foundation is at a crossroads now. We are going to continue to be a convener of philanthropic resources in the community. We are building on our strong presence in the community to expand our impact. I am honored to be a part of this journey. PAUL KAGO

My entire family believes that we must each recycle our best energies and resources into community-building... because a sustainable, healthy, safe, connected community reflects the best values of all of us; values of justice, compassion, mindfulness and grace. DOUG HOLTE

If it is to be, it is up to me.” We feel that rather than look to others to address our most important issues, we should be part of the discussion and part of the solution. And because our “Why” is so strong, giving time and resources is part of our everyday life and not an additional activity or task: it’s just who we are and what we do. RESHMA BLOCK

OCCF is my connection to Orange County, from the grassroots level up to decision-makers; and OCCF is dedicated to bringing the community together and making a positive difference. HERBERT BEDOLFE

I am well aware that all too many in our country face daunting challenges. I believe I can make a difference in the lives of some and open avenues that will enable them to better their lives. KEITH SWAYNE
2016 BY THE NUMBERS (IN MILLIONS)

**Total Assets**

- 2001: $49
- 2006: $91
- 2011: $136
- 2016: $265

**Annual Contributions**

- 2001: $17
- 2006: $26
- 2011: $29
- 2016: $82

**Grants & Scholarships Awarded**

- 2001: $10
- 2006: $18
- 2011: $29
- 2016: $60

**TOP 10% IN ASSETS AMONG U.S. COMMUNITY FOUNDATIONS**

- Dick Allen
- Don Beall
- Paul Heeschen
- Julie Hill
- Mike Mussallem
- Bill Podlich
- Bill Thompson
- Marcia Adler
- Sam Anderson
- Hyla Bertea
- Janet Colclaser
- Jeffrey Dankberg
- Robert Grant
- Kelly Hallman
- Lee Hancock
- Robert Ihrke
- Timothy J. Kay
- Joann Leatherby
- Paul F. Marx
- Thomas Nielsen
- David Seigle
- Elizabeth Stahr
- Ginny Ueberroth
- Socorro Vasquez
- Carol Wilken

**7TH MOST ACTIVE GRANTMAKER AMONG U.S. COMMUNITY FOUNDATIONS**

**WHY** measure the good? Because no matter how high the bar, we are inspired to continue raising it for good, forever.
At the heart of OCCF you will find the great loves of our life: service to local philanthropists and leadership on behalf of our community. Our passion for growing the good in Orange County fuels our partnerships with generous donors striving for impactful giving, as well as our role as a leader and catalyst for change on the issues that matter most to the future of our county. We live to show Orange County our love!

Our Mission...

to encourage, support and facilitate philanthropy in Orange County
What follows good intentions? The capacity to achieve big goals by bringing together the right people, at the right time with the right resources. That’s why we’ve added the Center for Engaged Philanthropy to our mix.

Orange County is known for its vibrant innovation and entrepreneurial drive. So why shouldn’t such creativity and individuality also apply to the practice of philanthropy? Now, with the launch of OCCF’s Center for Engaged Philanthropy, it does.

Launched by OCCF in July 2016, the Center for Engaged Philanthropy offers unprecedented access to customized philanthropic services—ideal for supporting the needs of individual and family philanthropists, as well as private foundations. You’re invited to collaborate with our dedicated Center for Engaged Philanthropy team, who will help you connect with issues that reflect your values and passions, while expanding your awareness of giving and charitable options.

Donors can count on OCCF to create a customized giving plan that includes a personal philanthropic mission statement, multigenerational family engagement, private invitations to educational events and site visits, and administration of defined grant programs. Most importantly, you’ll benefit from our deep knowledge of the Orange County nonprofit sector and our unparalleled experience with all facets of a focused and intentional approach to giving.

We’re here to support your creative philanthropic ideas and bring them to life!
For more than 15 years, Todd Hanson has provided support to some of Orange County’s most generous families through OCCF, helping them achieve their philanthropic goals and inspiring effective and impactful giving.

The Family Foundation Alliance is a group of local family foundations committed to learning and sharing together in order to maximize their philanthropic impact. Family philanthropy is a rewarding experience, but it can also be challenging and the Family Foundation Alliance offers resources and support through connections with local foundation peers as well as foundation and nonprofit experts.

The Impact Philanthropy group was created by charitably-minded professionals and emerging leaders living and working in Orange County. Each year members have the opportunity to participate in a collaborative grant-making program with the focus determined by the group. Contributions to the granting pool are matched by OCCF to expand the group’s impact.

What follows good intentions? The capacity to achieve big goals by bringing together the right people, at the right time with the right resources. That’s WHY we’ve added the Center for Engaged Philanthropy to our mix.

Congratualtions to OCCF on having the vision to create this new Center. Having worked very closely with our partners at OCCF since 2000, our family has benefitted greatly from all of your offered services and resources. Now, with this new Center, we plan on taking full advantage of enhanced levels of service and support as our family intends to expand our giving as well. Thanks again to OCCF, our trusted partner in philanthropy.

RANNEY DRAPER

Strategic Giving Planning
Customized giving planning to meet your family’s philanthropic objectives, including involvement of children and grandchildren.

Research
Timely and up-to-date analysis on issues and trends in fields of interest and specified nonprofits.

Due Diligence
Provide personal consultation and site visits to ensure effectiveness and impact of prospective grantees.

Data Collection
Provide extensive program, financial and governance data collection on nonprofits of interest.

Grant Program Management
Create grant programs and initiatives, advise on selections and award amounts and manage grant awards.

Monitoring & Reporting
Monitor impact of grant awards by reporting on grantee outcomes and use of funds.

Todd Hanson Vice President

For more than 15 years, Todd Hanson has provided support to some of Orange County’s most generous families through OCCF, helping them achieve their philanthropic goals and inspiring effective and impactful giving.
"The two most important days in your life are the day you are born and the day you find why."
DAYS ARE BORN OUT — MARK TWAIN
HEARTS IN ACTION

What gets Donnie Crevier revved up?

“Anytime I see someone trying their heart out and not able to get where they want to go, I want to help,” he said, “especially kids.”

Crevier reveals that this impetus is rooted in his own childhood. Despite growing up in the affluent community of Laguna Beach, Crevier remembers the many challenges his single mother faced. As they moved from apartment to apartment, Donnie found stability at the Boys & Girls Club of Laguna Beach – which he remains deeply connected to as a member of its board of directors.

“I’m especially focused on getting kids to think more about their education, and getting them excited about learning and completing school,” Crevier said, which he accomplishes through his family foundation as well as a donor-advised fund at OCCF.

One of his most innovative philanthropic endeavors combines two of his greatest passions: youth education and the automotive industry. A partnership of the Santa Ana Chamber of Commerce and Santa Ana Unified School District, High School Inc. Academies (HSI) helps students develop the specific skills needed to work in high-growth, high-tech industries.

Crevier provided resources to kick-start HSI a decade ago, lending his support to train automotive technicians who would be “ready to hire” upon graduation from high school. Since then, Crevier, along with other HSI leaders, has realized they’re doing more than simply preparing students for sustainable employment, and points to students’ 95 percent high school graduation rate.

“These kids develop a passion for learning,” Crevier said, who serves as HSI board chair this year. “They see the benefits of education in the long term.”

And that’s exactly the kind of success that keeps Crevier’s passion for giving in high gear.

How do you get started? These donors say the more they work with OCCF, the clearer their philanthropic vision becomes. Their work is changing lives — including their own.
How do you get started? These donors say the clearer their philanthropic vision becomes. Their work is changing lives — including their own.

During her lifetime, Doreen D. Marshall blazed trails as the first female mayor of Newport Beach. Her legacy now lives on through funds established at OCCF to support youth development and ensure that the arts flourish in Orange County.

Before her passing in 2011, the longtime Lido Island resident and her husband established the Robert J. and Doreen D. Marshall Fund for Dramatic Arts and Classical Music. In 2002, she also started the Doreen D. Marshall Fund for Youth to fund programs that support youth from birth to age 20.

Marshall’s approach to philanthropy reflected her leadership style: she entrusted others with her vision, and sought the greatest impact possible. She shared her philanthropic desires with us and trusted OCCF to make her dreams come true. In her name, OCCF has awarded nearly $800,000, which has benefitted nearly 50,000 future musicians and artists.

A LIFE IN SERVICE TO OTHERS

Michael Berchtold knows a good investment when he sees one — after all, the Laguna Beach-based executive spent almost three decades in global finance and banking. So when he and his wife Trish sought a philanthropic partner, he applied the rigorous due diligence usually reserved for an international investment opportunity, which led him straight to the Orange County Community Foundation.

“The team at OCCF really understands the needs of our community and is focused on leading the way to make Orange County a better place for all — especially the underserved,” said Mike, now an OCCF board member and chair of OCCF’s Investment Committee.

Among their most treasured charitable investments, the Berchtolds passionately support Hoag Hospital.

“Philanthropy is critical to Hoag,” said Trish, a former pediatric oncology nurse. “It allows them to recruit the very best doctors and nurses, equips them with the latest medical technology and supports innovative healthcare.”

That’s a return on investment that benefits us all.

A FAMILY INVESTMENT IN HEALTH AND HOPE

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ACT ANAHEIM

A robust community partnership is changing the lives of Anaheim youth and charting a course for its next generation of leaders. Accelerate Change Together Anaheim (ACT Anaheim) was launched in 2013 by Disneyland Resort, Angels Baseball and Anaheim Ducks. This powerhouse coalition asked OCCF to serve as managing partner, and by 2016 grants delivered through ACT Anaheim totaled $5 million, helping more than 8,000 Anaheim youth become college- and career-ready. Learn more at oc-cf.org/act-anaheim.

OC VETERANS INITIATIVE

The Orange County Veterans Initiative (OCVI), launched by OCCF in 2011, is helping create the welcome home that OC veterans deserve as they transition to civilian life. In 2015, OCCF revealed The State of the American Veteran: The Orange County Veterans Study. Based on its findings, OCCF partnered with local donors to deliver $500,000 to nonprofits providing critically-needed support for veterans and their families. The study also inspired the first annual Orange County Real Estate Luncheon, held in partnership with OCCF to benefit local veterans. The event raised more than $550,000 to benefit nonprofits providing health, education and employment services for veterans, significantly expanding the impact of the OC Veterans Initiative. Learn more at oc-cf.org/oc-veterans-initiative.

“ACT Anaheim, which has been shepherded with inspired leadership from OCCF, has been a clear success from the start. This early momentum has drawn more and more support from throughout the community to get involved in giving Anaheim’s youth the opportunity to reach their full potential.

Michael Colglazier
President | Disneyland Resort

The 2015 Orange County Veterans Study highlighted a real need to support veterans returning home. Our first annual OC Real Estate Luncheon showcased how an industry can make a positive impact.

Pat Donahue
Chairman – Chief Executive Officer | Donahue Schriber Realty Group

Where do the best ideas come from? From knowing where to look, what to ask,
Where do the best ideas come from? From knowing where to look, what to ask, and how to choose. And most importantly, from those you take with you on the journey.

The contributions of generations of immigrants have shaped Orange County throughout our history. The continued growth and vitality of our county depends on an engaged, educated and economically-stable population that incorporates the skills and talents of our diverse communities. The OC Opportunity Initiative was launched in 2016 to help immigrant communities realize their full potential through funding for 18 nonprofits that provide outreach, education and legal services to ensure the full participation of immigrant communities in the economic and civic life of our county. The program is spearheaded by a regional collaborative of grantmakers dedicated to improving the lives of Orange County immigrants, including local private, corporate, and family foundations, and regional funders. Learn more at oc-cf.org/oc-opportunity-initiative.

We support the OC Opportunity Initiative as a way to leverage partnerships and build infrastructure across the sector that will not only better support services to immigrants—our ‘dear neighbors’—but to strengthen and enrich our entire community.

Jason Lacsamana
Program Officer | Community Partnership Fund | St. Joseph Health

OC OPPORTUNITY INITIATIVE

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OC GIVING DAY

The Orange County Community Foundation powered Orange County’s second annual i♥OC Giving Day on April 27-28, 2016, raising more than $3.25 million in support of local nonprofits in just 30 hours — an 80% increase over the inaugural Giving Day in 2015! In just two years, the i♥OC Giving Day total now exceeds $5 million. The online giving campaign has helped local nonprofits raise the visibility of their organizations, attract new donors, raise needed operating funds, and actively engage with the broader community. Thank you for showing your love, Orange County! Learn more at iheartoc.org.

We support the OC Opportunity Initiative as a way to leverage partnerships and build infrastructure across the sector that will not only better support services to immigrants—our ‘dear neighbors’—but to strengthen and enrich our entire community.

Jason Lacsamana
Program Officer | Community Partnership Fund | St. Joseph Health

I am overwhelmed by the generosity of our community and thankful for the incredible impact of the nonprofits that benefited!

Carol Ferguson
Senior Donor Relations & Programs Officer
Orange County Community Foundation

I♥OC GIVING DAY

The Orange County Community Foundation powered Orange County’s second annual i♥OC Giving Day on April 27-28, 2016, raising more than $3.25 million in support of local nonprofits in just 30 hours — an 80% increase over the inaugural Giving Day in 2015! In just two years, the i♥OC Giving Day total now exceeds $5 million. The online giving campaign has helped local nonprofits raise the visibility of their organizations, attract new donors, raise needed operating funds, and actively engage with the broader community. Thank you for showing your love, Orange County! Learn more at iheartoc.org.
I am inspired every day by the role OCCF plays in bringing together nonprofits and philanthropists to improve our community. I get to help people nurture their passion for investing in the people and communities that we all care about.

CATHLEEN OTERO

I am the lucky one! There is good in the world and I get to be part of it every day at OCCF. I spend my days working to build up people and communities by supporting the efforts of donors making Orange County a better place to live.

LISA WILTERINK

My role ensures that our accounting is accurate and that our assets are being used for the purposes designated by the donors. By keeping assets safe, we can facilitate our ability to do good in the community and find satisfaction in giving potential donors confidence in our abilities.

TRACY BRANSON
In my eyes, OCCF is a catalyst for greater good. I am proud of the work I do with the Foundation to create synergies between nonprofits and people to build communities. I feel great satisfaction in knowing that my job truly makes a difference.

MOLLIE ESPOSITO
INVESTMENT STRENGTH

INVESTMENT DISCIPLINE & STEWARDSHIP

For 27 years, the Orange County Community Foundation has provided astute and diligent stewardship of the charitable assets entrusted to our care.

OCCF’s Board of Governors establishes guidelines, approves asset allocation, and reviews investment performance each quarter. The OCCF Investment Committee implements the board’s strategy with the support of our independent investment advisor, Cambridge Associates.

To help donors make the most of their charitable dollars, OCCF manages investments to maximize returns while minimizing risk. A diversified portfolio of stocks, bonds, mutual funds and alternative investments, managed with vigilant and proactive attention, protects philanthropic investments.

FOR UP-TO-DATE INFORMATION ON OCCF INVESTMENTS PLEASE VISIT OC-CF.ORG/INVESTMENT.

ABOUT CAMBRIDGE ASSOCIATES

OCCF chose Cambridge Associates as our primary investment advisor in 2015. With nearly 1,000 clients and $8 billion in assets under management, they are among the most highly-regarded advisors to foundations, educational institutions and charitable entities in the U.S. Through 40 years of service their fundamental mission has remained unchanged: to help institutions and private investors meet or exceed investment objectives with proactive, unbiased advice grounded in intensive and independent research.

AN INVESTMENT IN KNOWLEDGE ALWAYS PAYS THE BEST INTEREST.

– BENJAMIN FRANKLIN

WHY does being informed matter? Because smart giving means using the best
FINANCIAL STATEMENTS

SUMMARY CONSOLIDATED STATEMENT OF FINANCIAL POSITION  JUNE 30, 2016

**ASSETS**

<table>
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<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
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<td>Investments</td>
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<tr>
<td>Contributions Receivable</td>
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<td>Land, Building and Equipment, net</td>
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<td>Other Assets</td>
<td>5,847,000</td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$264,849,000</td>
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**LIABILITIES**

<table>
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<tr>
<th>Description</th>
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<tbody>
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<td>Grants and Pledges Payable</td>
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<tr>
<td>Accounts Payable and Accrued Liabilities</td>
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<tr>
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<tr>
<td>Due to Other Agencies</td>
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**NET ASSETS**

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**TOTAL LIABILITIES AND NET ASSETS**                   | $264,849,000 |

SUMMARY CONSOLIDATED STATEMENT OF ACTIVITIES  YEAR ENDED JUNE 30, 2016

**REVENUE AND SUPPORT**

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<td>Other Income</td>
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**EXPENSES**

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<tr>
<td>Grants and Scholarships</td>
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<td>Administrative and Development Expenses</td>
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<td>$65,599,000</td>
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**CHANGE IN NET ASSETS**                             | Amount   |
<table>
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<tr>
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<td>NET ASSETS END OF YEAR</td>
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<td><strong>CHANGE IN NET ASSETS</strong></td>
<td>$16,887,000</td>
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IF YOU WOULD LIKE A COPY OF THE FINANCIAL STATEMENTS AUDITED BY MOSS ADAMS LLP, PLEASE VISIT OUR WEBSITE OC-CF.ORG OR CALL THE FOUNDATION’S OFFICE AT 949.553.4202.

of both the head and the heart, and that just happens to be our specialty.