30 Years of Impact

OC-CF.ORG
As we build on 30 years of leadership in the Orange County community, we renew our commitment to unleash the philanthropic potential of our donors and partners, to pioneer solutions to our region’s most pressing challenges, and to channel our expertise into meaningful impact now and for generations to come.

It remains our greatest joy and honor to serve as Orange County’s Community Foundation.

A Celebration of Impact 30 Years in the Making

In 2019, we celebrate 30 years of Orange County Community Foundation leadership. Over the past three decades, we have been a dynamic force for good—inspiring a passion for lifelong philanthropy in individuals, families, and businesses, faithfully stewarding our donors’ intentions, and catalyzing sustainable community impact in Orange County and beyond.

At the tender age of 30, OCCF is among the younger members of a community foundation field with more than 100 years of history, yet we have distinguished ourselves among our peers in both growth and impact.

OCCF is the 10th most active grantmaker among 780 U.S. community foundations—a higher proportion of our assets is distributed through grants to nonprofits and scholarships to deserving students than all but nine of our community foundation peers across the nation.

Of all the metrics of growth and accomplishment that we could celebrate at our 30th anniversary, nothing is more meaningful than the philanthropic impact we have achieved.

“The meaning of life is to find your gift. The purpose of life is to give it away.”

—PABLO PICASSO

As we build on 30 years of leadership in the Orange County community, we renew our commitment to unleash the philanthropic potential of our donors and partners, to pioneer solutions to our region’s most pressing challenges, and to channel our expertise into meaningful impact now and for generations to come.

It remains our greatest joy and honor to serve as Orange County’s Community Foundation.

Reshma Block
Board Chair 2019-2021

Shelley M. Hoss
President & CEO
2019 BY THE NUMBERS
FINANCIAL SNAPSHOT (IN MILLIONS)

**TOTAL ASSETS**
$405M

- **2004**: $58
- **2009**: $101
- **2014**: $229
- **2019**: $405

**TOTAL CONTRIBUTIONS**
$84M

- **2004**: $18
- **2009**: $21
- **2014**: $56
- **2019**: $84

**TOTAL GRANTS & SCHOLARSHIPS AWARDED**
$69M

- **2004**: $7
- **2009**: $21
- **2014**: $47
- **2019**: $69

INVESTMENT PERFORMANCE
AS OF JUNE 30, 2019

- **1 YEAR**: 5.6%
- **3 YEAR**: 8.7%
- **7 YEAR**: 6.9%
- **10 YEAR**: 8.4%

INVESTMENT COMMITTEE

- Michael Berchtold, Chair
  CEO, Berchtold Capital Partners
- Vicki Booth
  President, Ueberroth Family Foundation
- Wendy Cupps
  Co-Founder and Trustee, Golden Eagle Foundation
- Richard Gadbois
  Argyle Street Management Limited
- Paul Heeschen
  Managing Partner, Heeschen & Associates
- Kristen Monson
  Trustee, UCI Foundation
- Greg Palmer
  Managing Partner, GPalmer & Associates
- Andrew Policano, Ph.D.
  Professor Emeritus and Former Dean, The Paul Merage School of Business,
  University of California, Irvine
- Paul C. Westhead
  Managing Director, Rimrock Capital Management LLC

HOME TO MORE THAN
570 CHARITABLE FUNDS

TO VIEW OCCF'S 2019 AUDITED FINANCIAL STATEMENTS, PLEASE VISIT WWW.OC-CF.ORG OR CALL (949) 553-4202 TO RECEIVE A COPY BY MAIL.
Our mission is to inspire a passion for lifelong philanthropy, faithfully steward the intentions of our donors, and catalyze sustainable community impact.

Experience our 30-year journey
In 1989, Judy Swayne founded the Orange County Community Foundation (OCCF). It is gratifying to see the positive impact we've had on the myriad of needs that Orange County, we could not predict to build a $10 million endowment.

In 1994, a group of passionate community leaders joined forces to found the Hispanic Education Endowment Fund (HEEF) to help Hispanic youth fulfill their dreams of higher education. Launched with an initial goal of raising $1 million to fund college scholarships, HEEF has raised over $4.1 million and has provided scholarships to over 43 students in support of their college education.

Ben and Carmela Du have always been passionate about what we can while we're here. Their family legacy lives on. They supported Hoag Hospital and the Catholic Church. Their county and in their native Philippines. More recently, they've supported OC Veterans Initiative, securing employment, housing, and meeting critical health needs for County Veterans Study, exposing the challenges veterans face in achieving a complete and accurate veteran employment database.

Doug and Jennifer Hansen were joyful, despite doctors' predictions that their daughter Angel would not survive infancy. Full of love and determination, they've invited all kids to the playground.

Reshma Block elected Board Chair in 2015. And Orange County Community Foundation (OCCF) 25th anniversary, OCCF challenge OC residents to give where their heart lives. In 2015, OCCF released The State of the American Veteran: The Orange County Veterans Initiative: The Welcome Home They Deserve.

To commemorate our 25th anniversary, OCCF and Orange County Veterans Study, exposing the challenges veterans face in achieving a complete and accurate veteran employment database. We've found it.

We found it.
89 percent of low-income first-generation students leave college within six years without a degree.

The dropout rate of first-generation students is four times that of second-generation students.

Source: Forbes

Long-time OCCF donor Ranney Draper is driven by a passion for helping deserving, often first-generation students gain access to higher education. After years of effort and millions of dollars of philanthropic investment, Ranney realized that the students he had worked relentlessly to help get to college faced significant barriers to completing their college degrees.

**Giving Underserved Students a Chance to Beat the Odds**

Ranney realized that a new approach was needed, and he was committed to being part of the solution. He turned to OCCF with his idea, and our research identified a promising partner in InsideTrack, which coaches students to meet financial aid deadlines, develop effective study habits, set short- and long-term academic and professional goals, and foster a social connection within their campus communities.

Their methods were effective in keeping kids on track toward college completion, and they had the data to prove it.

**Challenges Are Meant to Be Overcome**

In partnership with OCCF and several fellow donors, Ranney launched the OC Promise Initiative, a comprehensive program of mentoring, coaching, and support. The end goal? Help each student develop the self-reliance and accountability to earn a four-year degree.

In 2019, the first 50 OC Promise students benefited from the support of InsideTrack for their freshman year. More than 75% announced plans to return to their school for their sophomore year, and many were inspired to enrich their undergraduate years by exploring opportunities to study abroad or begin career-related internships.

A second pool of 60 students has now commenced its participation in OC Promise, with nothing but success on their minds.
Pamela McGee Adams always believed in uplifting women and girls in their professional and personal lives—a passion she lived out through her career as well as her philanthropic efforts.

Pam earned her MBA from the Paul Merage School of Business at the University of California, Irvine (UCI), and went on to support the UCI Center for Investment and Wealth Management Financial Literacy Program, as well as serving as Founding Chair of the Merage School Dean’s Leadership Circle. She also poured her heart into Orange County nonprofits and organizations focused on helping young girls succeed, including Girls Inc. and Big Brothers Big Sisters.

A Commitment to Pay it Forward

In her late 50s, Pam was diagnosed with brain cancer, but she didn’t let that deter her philanthropic commitment. In fact, ensuring that her charitable vision lived on was more important than ever.

In 2017, with OCCF’s guidance, Pam established The Pamela McGee Adams Financial Literacy Fund. Each year, it provides scholarships to UCI’s Merage School of Business LIFEVest Financial Literacy Summer Residential Program, which enables rising 9th and 10th grade students to prepare for success in high school and college. The students learn valuable financial and life skills in a supportive, on-campus environment, combatting the educational gap often faced by low-income students. LIFEVest instructors instill the desire for students to strengthen their grasp of financial matters, and encourage admission and foster graduation from a four-year college or university.

In alignment with Pam’s philosophy that professional success and charitable giving go hand in hand, these scholarships allowed her to pay it forward so future students can thrive.

Pam was a long-time champion for girls, and her passion for financial literacy continues to create great impact. Her deep desire to ensure that girls understand the importance of being financially savvy thus leading them to become self-sufficient, confident, and productive young women is perfectly aligned with the Girls Inc. mission. We are so grateful for her commitment and for the opportunity this program provides to so many girls. She was truly a Strong, Smart & Bold woman.

—Lucy Santana, CEO, Girls Inc. of Orange County

“By endowing these scholarships, I hope to pass on my philosophy of giving with intention, so our younger generation’s philanthropy makes a positive difference.”

—Pamela McGee Adams
GIVE WHERE YOUR HEART LIVES 2020

In honor of our 25th Anniversary, OCCF celebrated the Orange County nonprofit sector by hosting a first-ever countywide day of giving in 2015. OCCF challenged Orange County residents to "Give Where Your Heart Lives" and support the causes and organizations they cared about most. iOC Giving Day was born, and the results achieved in 2015 and 2016 were awe-inspiring.

Inaugural Giving Days: $5 million raised

- 2015: 347 nonprofits raised more than $1.8 million in just 30 hours
- 2016: $3.2 million in contributions were generated by 418 nonprofits

Giving Days 2.0: Taking it to the Next Level

While we were thrilled with the success of our first two Giving Days, we envisioned an even more promising model for future impact. The result was a plan to transform an annual iOC Giving Day into multiple Collaborative Giving Days held throughout the year, with Orange County nonprofits taking the lead. We empowered groups of OC nonprofits to hold their own Giving Days throughout the year—and across the county—to widen the circle of engagement, visibility and support. Once again, the results have exceeded our highest expectations.

Giving Days 2.0: $3.1 million raised and counting!

- 2018: 7 Giving Days, 78 participating nonprofits raised nearly $1.5 million
- 2019: 8 Giving Days raised more than $1.6 million for 77 participating nonprofits

Working with OCCF was an incredible opportunity. We had the chance to work with agencies that we normally wouldn’t—and to collectively raise awareness and visibility about hospice care in our community. We truly made a difference."

—Michelle Wulfestieg, Southern California Hospice Foundation

All of us live and work in a community. A single person or agency can’t do this work or make a positive difference alone—we need to have that community around us. In creating the Collaborative Giving Days, OCCF gave us a chance to build our community of agencies centered on children to maximize our impact.”

—Pamela Pimentel, RN, MOMS Orange County

---

Spring 2020

Summer 2020

Spring 2020

Fall 2020

Winter 2020

Spring 2020

Spring 2020

Spring 2020
CELEBRATING A 30 YEAR JOURNEY

On September 19, OCCF’s past and current board members, friends and family gathered to reconnect and reflect on 30 years of philanthropic impact. We celebrated significant milestones and accomplishments, and honored three past Board Chairs—Ginny Ueberroth, Paul Heeschen, and Dick Allen—for their transformational leadership at key junctures in our history.

We were also joined by OCCF’s founding Board Chair, Carl Mitchell, who offered heartfelt words about our early goals and impact, as well as Carl St. Clair, Music Director for Pacific Symphony, who shares our 30th anniversary year in service to the Orange County community.

Carl Mitchell, and his wife, Beverly. Carl served as OCCF’s founding Board Chair from 1989-1991. Inspired by Judy Swayne’s vision for a strong community foundation, Carl established OCCF as a nonprofit entity and worked to grow the foundation’s size and presence in the community.

Paul Heeschen, Ginny Ueberroth, and Dick Allen. The honorees of the evening reflected Board leadership at pivotal moments during OCCF’s 30-year journey.

Past and present OCCF Board Members: (front row left to right) Keith Swayne, Dick Allen, Ginny Ueberroth, Reshma Block, Paul Heeschen, Carl Mitchell, (middle row left to right) Janet Colclaser, DeAnna Colglazier, Hyla Bertea, Marcia Adler, Vicki Booth, Timothy J. Kay, Robert Irhie, (back row left to right) Paul C. Westhead, Lee Hancock, Dr. Manuel Gómez, Dan Bolar, John M. Williams III, and Greg Palmer.