

THE
HEART
OF PHILANTHROPY IS
YOU

GIVE YOUR PASSION A **PULSE**

ANNUAL REPORT
2018

GIVE YOUR PASSION A PULSE

THE HEART OF PHILANTHROPY IS YOU

HEART *NOUN* \ HÄRT \: THE MOST VITAL PART OR ESSENCE; REGARDED AS THE CENTER OF THOUGHTS AND EMOTIONS, ESPECIALLY LOVE, COMPASSION AND COURAGE.

At the Orange County Community Foundation, we know the heart of philanthropy is **you**. Since 1989, we have worked where passion and purpose meet to create lasting impact in Orange County, across the nation and around the world.

Let us help bring your philanthropic dreams to life!

YOUR PASSION IS OUR MISSION

OUR MISSION IS TO **INSPIRE** A PASSION FOR LIFELONG PHILANTHROPY, FAITHFULLY **STEWARD** THE INTENTIONS OF OUR DONORS AND **CATALYZE** SUSTAINABLE COMMUNITY IMPACT.



As Chairman of the Board of Governors, I am **devoted to stewarding** our community's charitable resources and **transforming generosity** into positive impact now and for generations to come.



—Keith Swayne
Board Chair



It is my greatest joy to inspire a **lifelong passion** for giving in others – helping them achieve their philanthropic goals, and working together to build a **stronger, healthier future** for all in our community.



—Shelley Hoss
President

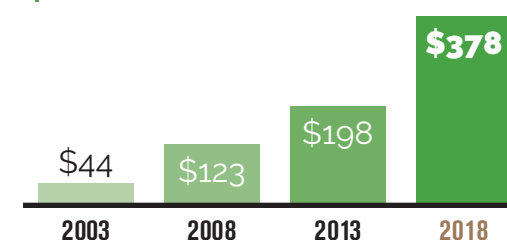


2018 BY THE NUMBERS

FINANCIAL SNAPSHOT (IN MILLIONS)

TOTAL ASSETS

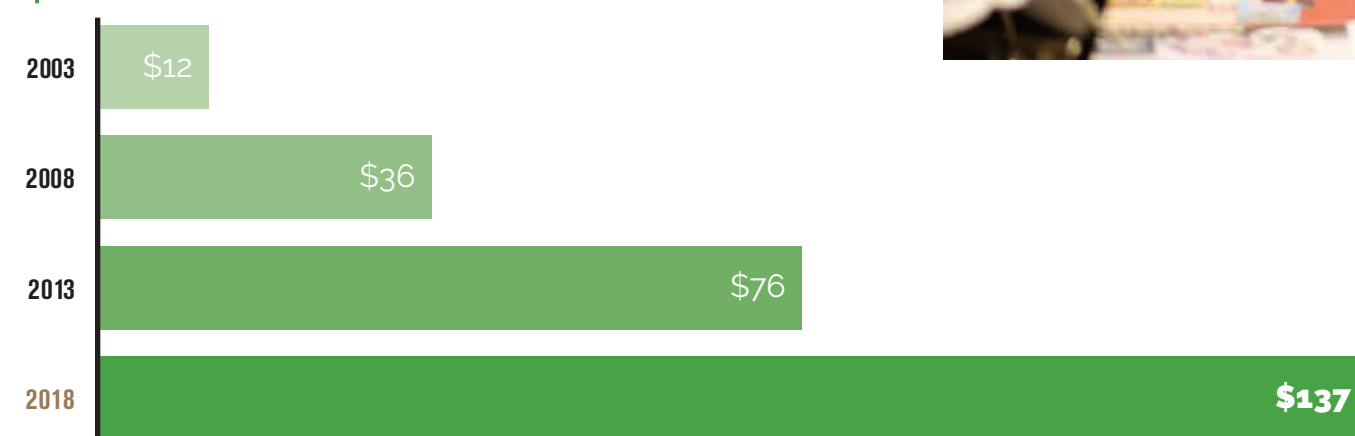
\$378M



TOP 2% IN GRANTMAKING
AMONG MORE THAN **780 U.S. COMMUNITY FOUNDATIONS**

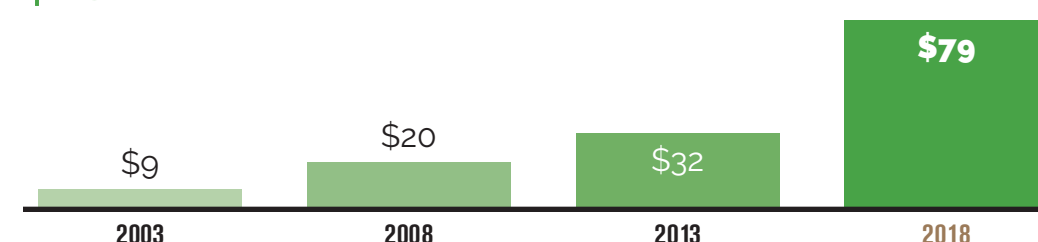
CONTRIBUTIONS

\$137M



GRANTS & SCHOLARSHIPS AWARDED

\$79M



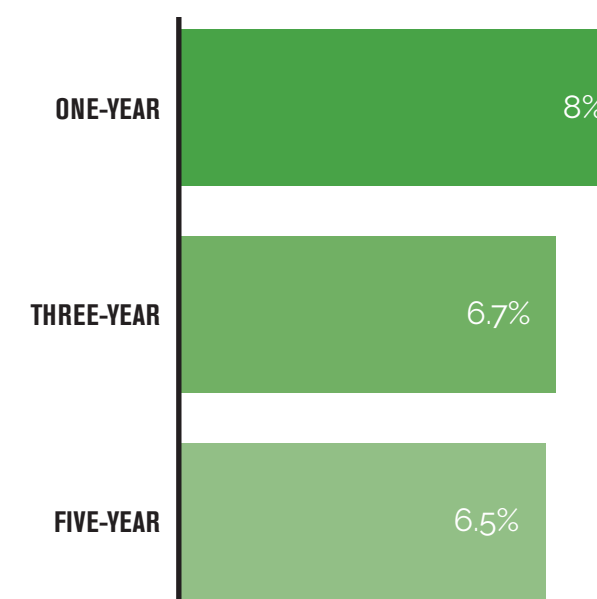
\$300 MILLION IN GRANTS
AWARDED OVER THE PAST **5 YEARS**



PHOTO COURTESY OF THE WOODEN FLOOR

INVESTMENT PERFORMANCE

ANNUALIZED RETURNS



Investment Committee

Michael Berchtold, Chair
CEO, Berchtold Capital Partners

Ranney Draper
Chairman, Spring Creek Investors LLC

Richard Gadbois
Argyle Street Management Limited

Paul Heeschen
Managing Partner, Heeschen & Associates

Douglas Hodge
Former CEO, PIMCO and Managing Partner, 7 H[S]Capital LLC

Timothy J. Kay
Partner, Snell & Wilmer

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 Westhead
Managing Director, Rimrock Capital Management, LLC

WHERE WILL YOUR PHILANTHROPIC JOURNEY LEAD?

No matter where you are in your giving journey, **OCCF is here to help.** We'll travel with you every step of the way to ensure that the passion and generosity in **your** heart create lasting impact now and for generations to come.

1. FIND YOUR PASSION

We help you transform your passion into impact by creating a plan tailored to your giving goals, and offering insight and knowledge to further your philanthropic visions wherever your heart may lead.



3. MAKE GIVING A FAMILY TRADITION

With extensive grant-making experience and local community knowledge, OCCF is uniquely equipped to help you engage your whole family in giving back.



2. CHANGE YOUR COMMUNITY

OCCF offers opportunities for you to collaborate with others who share your passion to create sustainable impact in Orange County and beyond.



4. LEAVE A LASTING LEGACY OF GENEROSITY

How can you ensure that your philanthropic visions endure for years to come? We'll help you express your vision to build your legacy now and for the future.

YOUR HOME FOR FAMILY PHILANTHROPY

Many families aspire to build a deeply-rooted tradition of philanthropy that will live on for generations. Ensuring a lasting philanthropic legacy requires extensive planning and expertise.

Whether working with us through your private foundation or giving back through a family fund, OCCF is the perfect partner for engaging your family near and far.

Our experienced staff will help you achieve the utmost in privacy, flexibility and family involvement so you can plant seeds of giving today that grow family values of generosity for years to come.



MURPHY FAMILY FOUNDATION

When Bob Murphy was a child, his mother passed down a piece of wisdom he'd never forget: "Don't ever feel sorry for yourself—and always help others less fortunate than you." To continue her legacy of giving, Murphy brought his family foundation to the experienced hands of OCCF at his professional advisor's recommendation. OCCF is assisting with his ongoing mission to empower his entire family to take an active role in helping those with disabilities, ensuring Murphy's legacy of giving is passed on from generation to generation.

To learn more about building a **family passion for philanthropy**, visit our Center for Engaged Philanthropy page under "Find Your Passion" at www.oc-cf.org.

PRATIMA LEGACY FUND

After the passing of his father, Anand Desai sought the expertise of a trusted OCCF advisor to help manage Project Deaf India, the foundation his father had created to improve the lives of India's deaf and hearing impaired. OCCF worked with Desai to transition the foundation into the Pratima Legacy Fund, named after his mother, where it is now being managed by OCCF to maximize impact for those most in need.

“I realized that running a private foundation was a major responsibility. Through OCCF, I can focus my efforts on making grants that honor my parents' charitable purpose, without the stress of managing the administration of a private foundation.” —ANAND DESAI



“We count on OCCF to help us create giving plans for our entire family. There's nothing more important than passing down our family's passion for giving back.” —BOB MURPHY

JOINING FORCES FOR OC VETERANS

For many of Orange County's more than 130,000 veterans, navigating the transition from service to civilian life is the greatest challenge of their military career. Many leave the military without a job, without permanent

housing and with significant unmet medical needs. To give Orange County's veterans the welcome home they deserve, OCCF partnered with generous donors, business leaders and community organizations to

create the Orange County Veterans Initiative (OCVI). Since 2011, OCVI has granted over \$2.3 million to local nonprofits, bringing critical support and services to more than 12,000 local veterans and their families.



ORANGE COUNTY REAL ESTATE LUNCHEON

Under the leadership of Chairman and CEO Patrick S. Donahue, shopping center owner Donahue Schriber is moving an entire industry in support of local veterans. This year, the company convened more than 575 top real estate and financial professionals for a luncheon that raised \$680,000 for Orange County nonprofits serving the veteran community.

“Our luncheon was about so much more than just raising funds. We wanted to demonstrate the power of collaborative, industry-wide action and make a tangible impact on veterans in our community. By partnering with OCCF, we know the proceeds are in the hands of the best nonprofits and our contributors are getting an excellent return on their charitable investment. –PATRICK S. DONAHUE”

The dream of a more vibrant, prosperous Orange County is alive and within our reach. To learn more about OCCF's **community impact initiatives** and how you can begin transforming lives, visit the “Change Your Community” page at www.oc-cf.org.

ANDREW & PAMELA HOROWITZ FUND

While actively practicing Internal Medicine and serving as a volunteer physician and member of the Board of Directors at the Laguna Beach Community Clinic, Pamela Lawrence-Horowitz MD was disappointed to discover that local veterans weren't receiving the support they needed upon discharge from the armed forces. Recognizing an important opportunity to help, she joined others at OCCF to form the OC Veterans Initiative. The initiative's scope has grown significantly to provide greater access to the medical and mental health care crucial to a healthy return to civilian life.



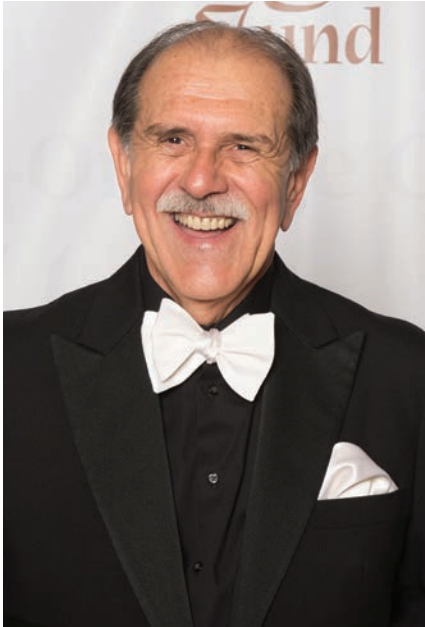
“It's inspirational to see an early concept grow to have such beneficial consequences on individuals, families and the community. Cooperative efforts from a strong team and superb leadership can reshape lives for the better, while providing a tacit ‘thank you’ for the service these men and women have given to their country. –DR. PAMELA LAWRENCE-HOROWITZ”

THE LEGACY OF A LIFETIME

Pursuing philanthropic passions during your lifetime can create transformative impact on the causes closest to your heart.

But what will live on beyond today? Your commitment to philanthropy can continue to grow through the most powerful gift of all: your legacy.

OCCF is here to steward your charitable vision during your lifetime and beyond, ensuring that your heart for philanthropy lives on.



THE GIFT OF HIGHER EDUCATION

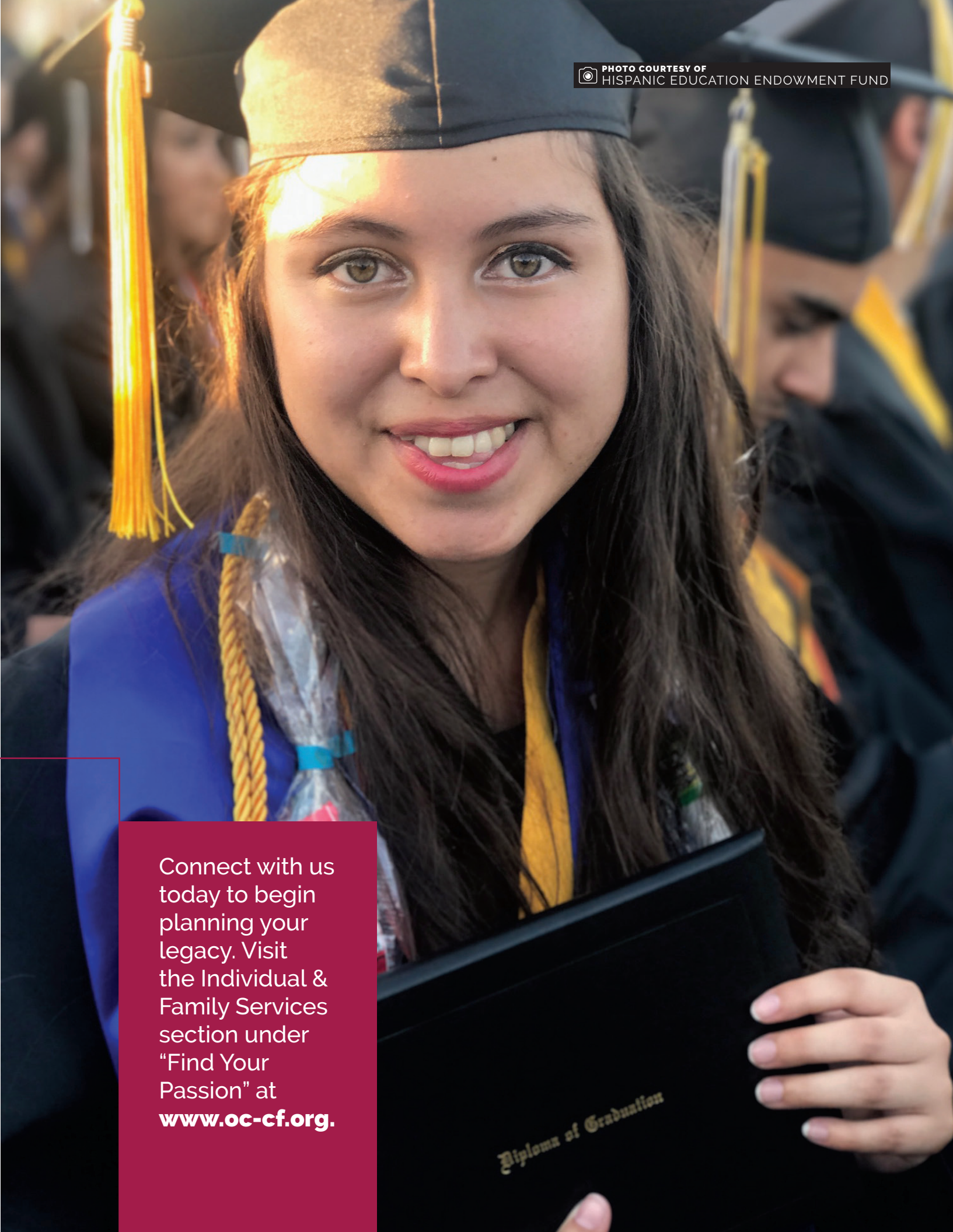
Dr. Juan Francisco Lara's greatest passion was providing the gift of higher education, to which he devoted his life. For 35 years, he served at University of California, Los Angeles and University of California, Irvine, where he worked tirelessly to support students and advance high-quality education through teaching, development programs and community partnerships.

Dr. Lara passed in 2016, but his passion will live on through his philanthropic legacy. His exceptional commitment to students inspired him to help found the Orange County Hispanic Education Endowment Fund (HEEF). Under OCCF's stewardship, HEEF has awarded more than 2,200 scholarships totaling over \$2.65 million to deserving students seeking higher education. Dr. Lara later created the Lara Family Scholarship to benefit talented community college transfers. Today, his relentless compassion for his students endures through these scholarships and the Dr. Juan Francisco Lara Visionary Leadership Award.

“Stand tall on your ancestors’ shoulders and mentor the next generation of leaders.” —DR. JUAN FRANCISCO LARA



PHOTO COURTESY OF
HISPANIC EDUCATION ENDOWMENT FUND



Connect with us today to begin planning your legacy. Visit the Individual & Family Services section under “Find Your Passion” at www.oc-cf.org.

BOARD OF GOVERNORS

(TOP, LEFT TO RIGHT)
2017-2018

Keith Swayne *Chair*
Keith and Judy Swayne Family Foundation

Reshma Block *Vice Chair*
Compass Consulting

Daniel Bolar *Finance Chair*
Bolar Hirsch & Jennings LLP

Michael Berchtold *Secretary*
Berchtold Capital Partners

Doug Holte *Past Chair*
Irvine Company Office Properties

Herbert Bedolfe
Marisla Foundation

Rachid Chamtieh
Deloitte & Touche LLP

DeAnna Colglazier
Community Strategist

Manuel Gómez, Ph.D.
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

John M. Williams III
Gibson, Dunn & Crutcher LLP



OCCF EXECUTIVE LEADERSHIP



Shelley Hoss
President

Tracy Branson
Vice President, Finance & Administration

Todd Hanson
Vice President, Center for Engaged Philanthropy

Mary Jacobson
Vice President, Philanthropic Planning & External Relations

Cathleen Otero
Vice President, Donor Relations & Programs



4041 MacArthur Blvd., Suite 510
Newport Beach, CA 92660 | 949.553.4202

oc-cf.org | ocnonprofitcentral.org

    @OCCommunityFdn



©2018 Orange County Community Foundation