



A large, stylized white graphic of the number '05' is centered on a dark red background. The '0' is a thick, rounded shape, and the '5' is composed of a horizontal bar at the top and a curved bottom.



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

—PABLO PICASSO

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.

\$630M

IN GRANTS AND SCHOLARSHIPS SINCE INCEPTION

TOP 1%

IN GRANTMAKING AMONG 780 U.S. COMMUNITY FOUNDATIONS

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



BOARD OF GOVERNORS

2019-2020



Reshma Block *Chair*
Compass Consulting



Daniel Bolar *Vice Chair*
Armanino LLP



Rachid Chamtieh *Finance Chair*
Deloitte & Touche LLP



John M. Williams III *Secretary*
Gibson, Dunn & Crutcher LLP



Keith Swayne *Past Chair*
Keith and Judy Swayne Family Foundation



Herbert Bedolfe
Marisla Foundation



DeAnna Colglazier
Community Strategist



Kate Duchene
RGP



Paul Kagoo
Western Digital



Dr. Alberto Manetta
UC Irvine School of Medicine



Susanna Vakili
Marriage and Family Therapist



Paul C. Westhead
Rimrock Capital Management LLC

EXECUTIVE LEADERSHIP



Shelley Hoss
President & Chief Executive Officer



Tammy Tumbling
Executive Vice President &
Chief Operating Officer



Tracy Branson
Chief Financial Officer



Todd Hanson
Vice President, Center for Engaged
Philanthropy



Mary Jacobson
Vice President, Philanthropic
Planning & External Relations



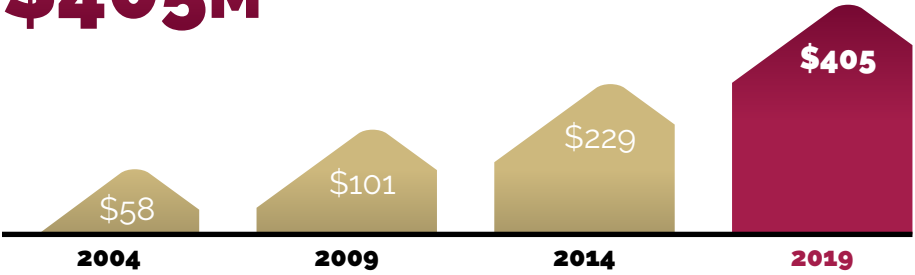
Cathleen Otero
Vice President, Donor Relations &
Programs

2019 BY THE NUMBERS

FINANCIAL SNAPSHOT (IN MILLIONS)

TOTAL ASSETS

\$405M



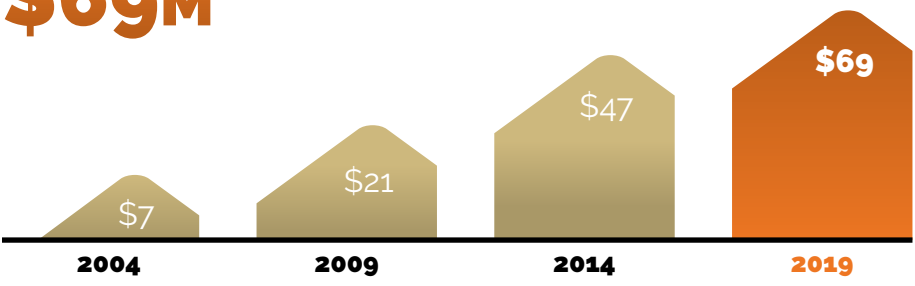
TOTAL CONTRIBUTIONS

\$84M



TOTAL GRANTS & SCHOLARSHIPS AWARDED

\$69M



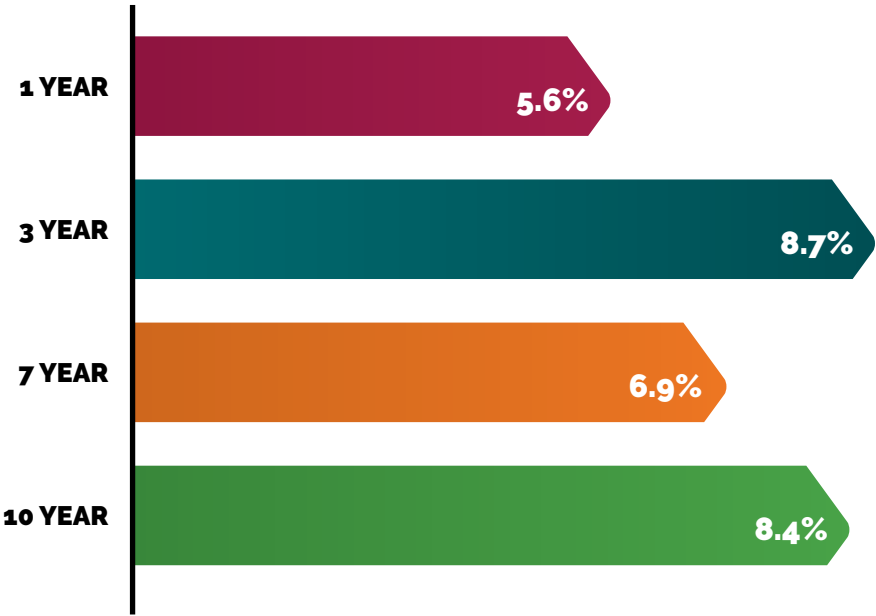
TO VIEW OCCF'S 2019 AUDITED FINANCIAL STATEMENTS, PLEASE VISIT WWW.OC-CF.ORG OR CALL (949) 553-4202 TO RECEIVE A COPY BY MAIL.



HOME TO MORE THAN
570
CHARITABLE FUNDS

INVESTMENT PERFORMANCE

AS OF JUNE 30, 2019



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



30 Years of IMPACT

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



AND
WE'RE NOT
DONE YET!

1989

A More Vibrant Orange County for All

In 1989, Judy Swayne founded the Orange County Community Foundation to facilitate impactful philanthropy and build a stronger local community for all who call Orange County home.



OCCC FOUNDER JUDY SWAYNE WITH HUSBAND KEITH

1989-1999

INSPIRE

10 YEARS

\$13.1M

CUMULATIVE
GRANTING

\$39M

TOTAL ASSETS

129

FUNDS

OCCC FOUNDER JUDY SWAYNE WITH HUSBAND KEITH



2002

**Ernesto and Socorro Vasquez:
Leveling the Playing Field**

Ernesto and Socorro Vasquez were among the few Latino students at Cal Poly San Luis Obispo in the late 60s/early 70s. Living on grants and food stamps, the couple pursued their dream of higher education. Even then, they vowed to spare future Hispanic students such struggle. The Vasquez family has partnered with OCCF and the Hispanic Education Endowment Fund (HEEF) to fund scholarships in architecture and engineering, awarding scholarships to 43 students in support of their college education.

"We are compelled to help level the playing field for Latino students. Even today, it is still a major accomplishment for a first-generation student to enter college and even more so, to complete their bachelor's degree."
—ERNESTO M. VASQUEZ

2008

**Angels Charity:
Inviting All Kids to the Playground**

Doug and Jennifer Hansen were joyful, despite doctors' predictions that their daughter Angel would not survive infancy. Full of love and determination, the Hansens formed Angels Charity with the goal of creating a safe recreational space for kids of all physical abilities. With OCCF's help in facilitating more than \$40,000 in donations and grants, Angels Playground opened on June 27, 2008 as the first playground in Orange County accessible to children with disabilities. What a fitting tribute to Angel's seventh birthday.

"The greatest gift to Angels Charity was having the support of the Orange County Community Foundation."
—DOUG HANSEN



2009

**A Commitment to
Community Leadership**

Dick Allen served as Board Chair from 2008-2011 as OCCF marked its 20th anniversary. During that time, he championed OCCF's development as a leader and agent of change in our community, paving the way for the impact achieved through multiple initiatives, including the OC Veterans Initiative and ACT Anaheim.



"We saw an opportunity to build on the powerful work OCCF had been doing with donors for 20 years by expanding our mission to also proactively tackle our county's greatest challenges. OCCF serves an incredible purpose, energizing and convening philanthropists and community leaders to build a more vibrant Orange County for all."
—DICK ALLEN

2012

**ConnectOC:
Our Orange County**

In 2012, with the support of McKinsey & Company, OCCF launched ConnectOC—a first-of-its-kind report providing insights into Orange County's inter-connected areas of need, as well as promising strategies for tackling the biggest challenges facing our community. ConnectOC.org—home to this first Community Report—then inspired Nonprofit Central, Orange County's first comprehensive, online database covering the local nonprofit sector.



2015

**The Welcome Home They Deserve:
OC Veterans Initiative**

In 2015, OCCF released The State of the American Veteran: The Orange County Veterans Study, exposing the challenges veterans face in securing employment, housing, and meeting critical health needs for themselves and their families. The OC Veterans Initiative has since granted over \$3 million to local nonprofits, reaching more than 17,000 veterans and their families.

30 YEARS

\$630M

CUMULATIVE
GRANTING

\$405M

TOTAL ASSETS

570

FUNDS

LOOKING
AHEAD

**Fueling OC's Future:
Workforce Development Initiative**

Educating, training and connecting OC youth and young adults to fill in-demand jobs for Orange County employers. Be part of the solution as a business, nonprofit or educational institution.
Contact: Cathleen Otero coteroc@oc-cf.org

**Philanthropic R & D:
Social Innovation Fund**

Employing a venture capital approach to accelerate promising new solutions to Orange County's greatest challenges. Be part of our philanthropy "shark tank"!
Contact: Todd Hanson thanson@oc-cf.org

**OC Counts:
Census 2020**

Achieving a complete and accurate count of OC residents to ensure our fair share of resources and representation over the next 10 years. Find out how you can help. Contact: Cathleen Otero coteroc@oc-cf.org

2019

**Reshma Block elected
Board Chair**

"As Board Chair, I'm most excited to push OCCF's mission forward—to use our experience to meet the needs of our changing community and make a lasting difference in Orange County. My goal is to leave this community better than we found it."
—RESHMA BLOCK



2015

**i♥OC: Give Where
Your Heart Lives**

To commemorate our 25th anniversary, OCCF challenged OC residents to give where their heart lives during Orange County's first i♥OC Giving Day in April 2015. And Orange County rose to the occasion, making 6,139 contributions totaling \$1.8 million for 347 local nonprofits in just 30 hours. Since 2015, i♥OC Giving Days have generated more than \$8 million for OC nonprofits. See story on page 26 to see how we've grown!



2010

**Pioneering OC's First Nonprofit
Shared Space**

Located on 17th Street in Santa Ana, The Village at 17th was created as the first shared space resource for nonprofits in Orange County.

"After serving on many boards and supporting many different nonprofits, it occurred to me: Why not focus my philanthropy on things that hold out the promise of benefiting numerous organizations from the effort that goes into one? At The Village, the collaboration, the sharing, and the networking between the employees lifts all the organizations."
—BILL PODLICH



2011

**Powering Family Foundation
Philanthropy**

Philanthropy can be a family's most rewarding experience, but can also create new questions and challenges—an issue brought to OCCF by local family foundations in 2011. Our answer was to create the **Family Foundation Alliance**. Through quarterly events featuring nonprofit experts and inspirational speakers, members explore strategies for being more effective, impactful, and engaged in achieving their family's philanthropic goals. With a growing membership of 50 family foundations and OCCF donors, FFA has become the place to be for fueling high-impact family philanthropy!

INTENTION

1999-2009

1994

**Enduring Support for
OC Nonprofits**

In 1994, Ginny Ueberroth chaired the Endow Orange County campaign to build a \$10 million endowment to meet Orange County's greatest needs in perpetuity. The Orange County Endowment, now totaling \$22 million, will continue to grow as a vital resource for local nonprofits for generations to come.



"When we set out to establish an endowment for Orange County, we could not predict the myriad of needs that the endowment would fill. It is gratifying to see the positive impact we've had on this county over the years, especially for those in need."
—GINNY UEBERROTH

1994

**Fueling Academic Dreams for
Hispanic Youth**

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's endowment now totals \$4.1 million and has provided scholarships of nearly \$2.7 million to more than 2,300 deserving students over the past 25 years.



2000

**Shelley Hoss Joins OCCF
as President**

"The opportunity to work with OCCF's extraordinary staff and Board in service to our community is the greatest privilege of my professional life."
—SHELLEY M. HOSS

2006

**The Du Family:
Passing on the Spirit of Giving**

Ben and Carmela Du have always been passionate about the arts and education, and working with OCCF allowed the couple to realize their philanthropic vision. They have supported numerous arts organizations including the Segerstrom Center for the Arts and Pacific Symphony, and have funded educational programs both in Orange County and in their native Philippines. More recently, they've supported Hoag Hospital and the Catholic Church. Their daughter Lizette is also active in the family's philanthropy, and is imparting the spirit of giving to her own children. The Du family legacy lives on.

"Our spirit of philanthropy is simple: We try to do what we can while we're here."
—BEN DU



\$144.3M

CUMULATIVE
GRANTING

\$101.4M

TOTAL ASSETS

405

FUNDS

20 YEARS

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

A second pool of 60 students has now commenced its participation in OC Promise, with nothing but success on their minds.

Source: Forbes



“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

Faithful Stewardship: **THE PAMELA MCGEE ADAMS FINANCIAL LITERACY FUND**

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

”

Catalyzing Impact: i♥OC GIVING DAYS

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. i♥OC 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 i♥OC 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



GIVE WHERE YOUR HEART LIVES 2020



Love Is
A GIVING DAY TO SUPPORT HEALTHY
TEEN RELATIONSHIPS IN ORANGE COUNTY

Winter 2020



Protect & Preserve
A Giving Day to Sustain
the Ecosystems of Orange County

Spring 2020



HELP THEM HOME
A GIVING DAY FOR OC'S HOMELESS

Spring 2020



IMPACT ANAHEIM
A GIVING DAY FOR THE UNDERSERVED YOUTH

Spring 2020



**EMPOWERING
POSSIBILITIES**
A GIVING DAY FOR OC NEIGHBORS WITH DISABILITIES

Spring 2020



STAND & SALUTE
A GIVING DAY TO HONOR OC VETERANS AND MILITARY FAMILIES

Summer 2020



PRESERVING DIGNITY
A GIVING DAY FOR OC'S OLDER ADULTS IN NEED

Summer 2020



**GREATNESS
AMPLIFIED**
A GIVING DAY FOR ALL
BOYS & GIRLS CLUBS IN ORANGE COUNTY

Summer 2020



IGNITING POTENTIAL
A GIVING DAY TO SUPPORT THE YOUTH
OF ORANGE COUNTY

Fall 2020

“ 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



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 Berteau, Marcia Adler, Vicki Booth, Timothy J. Kay, Robert Irhke, (back row left to right) Paul C. Westhead, Lee Hancock, Dr. Manuel Gómez, Dan Bolar, John M. Williams III, and Greg Palmer.





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