

2020 ANNUAL REPORT



PHI-LAN-THRO-PY

Noun, / fi-lan-thruh-pee /

1: goodwill to fellow members of the human race; especially: active effort to promote human welfare —*Merriam-Webster*
OCCF's mission begins, "to inspire a passion for lifelong philanthropy"—or according to Merriam-Webster, goodwill to fellow members of the human race, through active effort. The word's Greek roots define philanthropy as "love of mankind."

Philanthropy is love in action.

It is a call to our highest purpose—and at the Orange County Community Foundation, we have committed to answer that call through the challenges of 2020 and beyond.

To our donors: We will help you make the difference you yearn to make—in the world, our country and your community.

To our nonprofit partners: We will be a trusted and valued resource to advance your work.

To our community: We know that too many of our neighbors face a daily struggle to survive. We will continue to do better by building bridges of opportunity, equity and justice.

This is our promise to the Orange County community. Please join us. Learn with us. Challenge and inform us. Hold us accountable.

Let's get to work.



Reshma Block, Board Chair, with Shelley Hoss, OCCF President & CEO, at the 30th Anniversary Annual Meeting in November 2019

2020 BY THE NUMBERS*

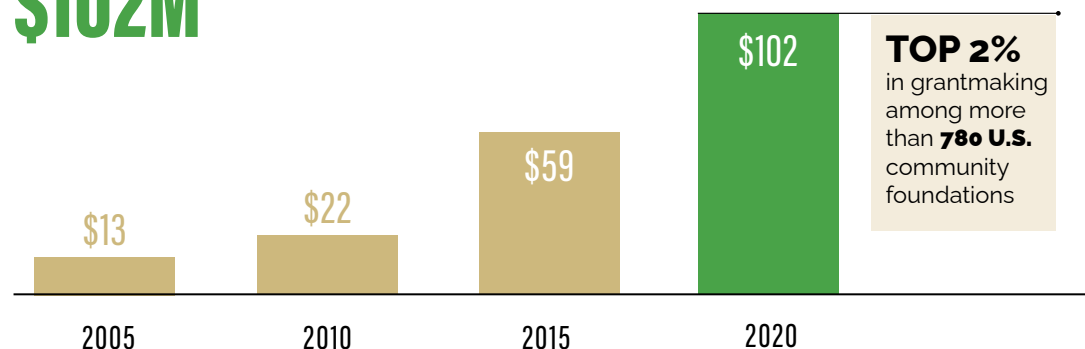
FINANCIAL SNAPSHOT
(IN MILLIONS)

\$732
MILLION IN
CUMULATIVE
GRANTING SINCE
INCEPTION

To view OCCF's 2020
audited financial
statements, please
visit www.oc-cf.org or
call (949) 553-4202 to
receive a copy by mail.

GRANTS & SCHOLARSHIPS AWARDED

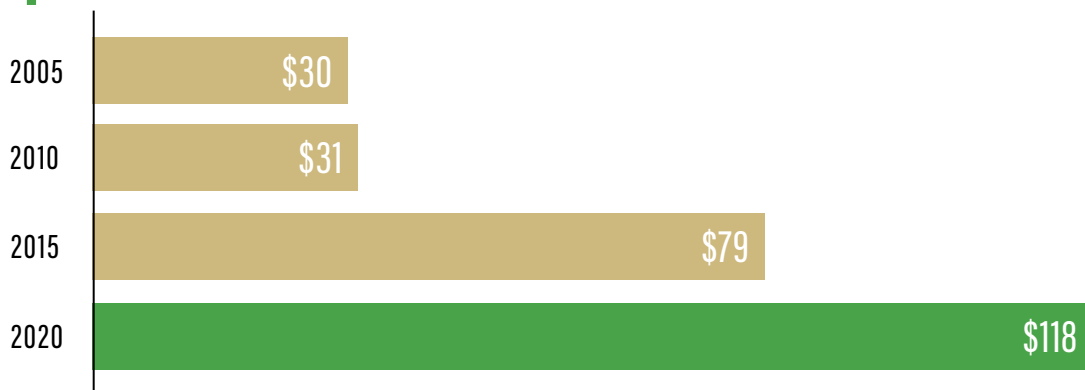
\$102M



TOP 2%
in grantmaking
among more
than **780 U.S.**
community
foundations

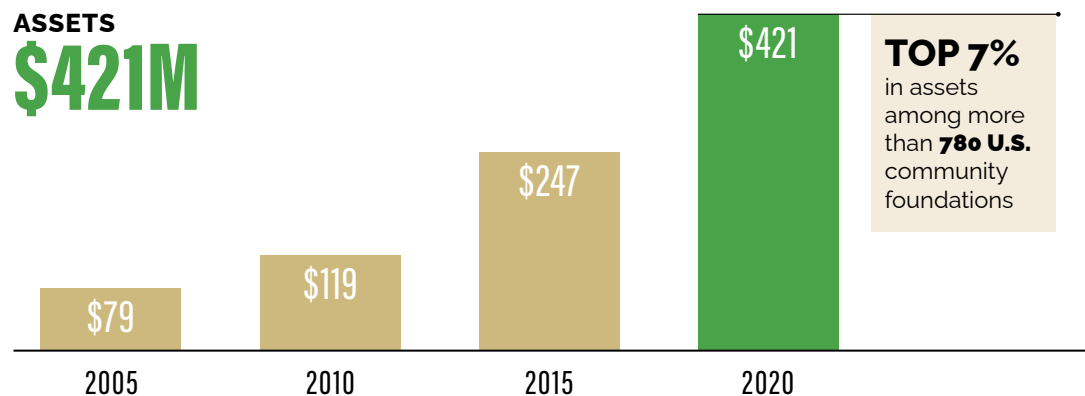
CONTRIBUTIONS

\$118M



ASSETS

\$421M

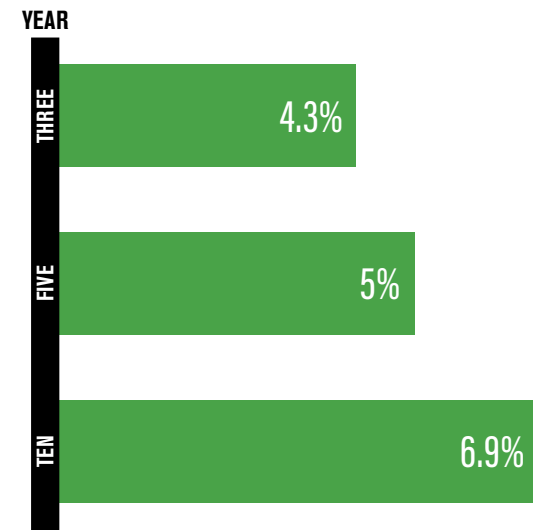


TOP 7%
in assets
among more
than **780 U.S.**
community
foundations

*For the year ended 6/30/20

INVESTMENT PERFORMANCE

Annualized returns (6/30/2020)



INVESTMENT COMMITTEE

Paul C. Westhead, Chair
Managing Director,
Rimrock Capital Management, LLC

Michael Berchtold
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

This year, OCCF launched an **Environment, Social and Governance Investment Pool (ESG Pool)** to provide an opportunity for our donors to invest their charitable assets in vehicles that prioritize environmental impact, sustainability and the diversity and inclusion demonstrated by the investment manager.

Our ESG Pool is up **11.1% YEAR-TO-DATE** as of September 30, 2020.

To learn more, contact
CFO Tracy Branson at
tbranson@oc-cf.org.

MOBILIZING SUPPORT FOR THOSE MOST AFFECTED BY THE PANDEMIC



Shea Center for Therapeutic Riding

In 2020, Orange County and the world were confronted with a pandemic that changed our collective way of life and continues to affect us on every front. Facing revenue shortfalls and a loss of hands-on volunteers, local nonprofits also saw a dramatic increase in the need for essential services among our community's most vulnerable residents. For low-income seniors, veterans, those living under the poverty line, the homeless, families with young children, the uninsured, people with disabilities and others, OCCF was moved to orchestrate a collaborative philanthropic response to strengthen and support the community-based organizations on which these residents rely.

OCCF, St. Joseph Community Partnership Fund, Charitable Ventures and OC Grantmakers rallied to raise and swiftly deploy funds to nonprofits struggling to meet what seemed like an endless onslaught of need.

After completing three rounds of granting, the OC Community Resilience Fund remains open as a community resource, conducting assessments of the pandemic's impact on our communities, monitoring ongoing needs within the nonprofit sector and offering guidance for individual and foundation funders seeking to provide the highest and most effective use of philanthropic resources.

THE ORANGE COUNTY COMMUNITY RESILIENCE FUND

SINCE MARCH

\$4.3M

HAS BEEN GRANTED TO

164

NONPROFITS

March 16 OC Community Resilience Fund launched

March 26 \$2M raised in 10 days

April 7 First grants awarded two weeks later

April–May New contributions fuel additional granting

By June 15 \$4.3M awarded to 164 nonprofit organizations



Southern California Hospice Foundation

Pacific Symphony

The Wooden Floor



FOR THE LOVE OF ENCORES, CURTAIN CALLS AND MASTERPIECES

OC ARTS & CULTURE RESILIENCE FUND

Orange County's creative sector, which directly and indirectly employs 90,000 artists who entertain and enrich our community, is facing an existential threat. After losing nearly 1 million admissions due to cancellations, along with reduced philanthropic support and other devastating economic effects, the sector estimates losing \$16 million in 2020*.

In the face of this tremendous need, Arts Orange County—which works to build art appreciation, interaction and education throughout our county—approached OCCF for help answering the call. As a result, in partnership with Charitable Ventures, the OC Arts & Culture Resilience Fund was born to support vital nonprofit arts and culture organizations, as well as the artists themselves.

In two rounds of initial grants, the Arts & Culture Resilience Fund supported 70 local artists and 19 arts and culture organizations, providing them with much-needed assistance through a challenging and uncertain time.

*Orange County Arts April 2020 Survey



News Literacy Project

HACKING THE IMPACT GAME

Tackling Orange County's growing challenges requires the active engagement of our community's most innovative minds. OCCF established the Orange County Social Innovation Fund in 2019 to support groundbreaking nonprofit efforts to solve entrenched problems with creative and sustainable solutions. Working with our donors and foundation partners, we are lending insight, experience and resources to fast-track the success of the best new ideas, emerging leaders and thriving organizations to bring game-changing impact to our community.

SOCIAL INNOVATION FUND FUELS OC INNOVATORS

The Tiyya Foundation

One of the Social Innovation Fund's first investments was in Tiyya's Flavors from Afar program, a social enterprise catering service designed to train and employ former refugees and asylum seekers. The proceeds support the organization's mission of helping refugees and immigrants seeking a fresh start in Southern California. Amid the challenges of 2020, Tiyya has provided pantry items, household supplies, diapers and toys to over 140 households with tremendous support from the flourishing Flavors from Afar program.



Given the vulnerability of the refugee resettlement sector and loss of funding, we knew we had to explore the idea of sustainability. After a year of experimenting with a concept of hiring refugee chefs through our social enterprise, Flavors from Afar, OCCF believed in our vision. Thank you for supporting our mission.



MEYMUNA HUSSEIN-CATTAN,
Co-Founder, The Tiyya Foundation

Mariposa Women & Family Center

In 2019, the Social Innovation Fund also helped Mariposa, a nonprofit specializing in women's health, launch a virtual counseling platform to provide private, affordable online counseling services for those with limitations to attend in person and vulnerable populations in need of mental health care. Now, with the technology in place to serve their clients, who need their services more than ever in these uncertain and trying times, Mariposa is expanding those services, offering free virtual support groups that allow those in need to participate from the safety of their home.

We're so proud to support innovative ideas and game-changing approaches across the nonprofit sector!

SOCIAL INNOVATION FUND 2020: START-UP SPIRIT

In September, six Social Innovation Fund nonprofit finalists pitched their causes to venture-oriented philanthropists in the same way business startups compete to win investors. It was an energized virtual event that spotlighted the revolutionary thinking necessary to solve Orange County's most pressing issues.

Who pitched perfectly to earn the funding? Look for more details and results about this year's event to come!



News Literacy Project

From intergenerational home-share opportunities to innovative, accessible mental health support and peace literacy, Social Innovation Fund finalists shined on our 2020 Demo Day. Each presented a solid case with clear passion for their cause.



The Tiyya Foundation



Peace Literacy

SOWING SEEDS OF GOOD

“

WE LIVE SIMPLY AND WANT OTHERS TO LIVE MORE FRUITFUL LIVES. WE'RE FORTUNATE TO BE IN A POSITION WHERE WE CAN THINK ABOUT OUR LEGACY—AND ESTABLISH A GIFT THAT WILL SUSTAIN THE WORK OF ORGANIZATIONS WE BELIEVE IN.

”

JOHN AND MARY KARYL THORNE

THREE DECADES OF THOUGHTFUL PHILANTHROPY

For the Thornes, their 66-year marriage has always involved sharing a passion for giving back. After spending more than three decades in Hawaii supporting community nonprofits, John and Mary Karyl Thorne are back in Orange County, where they continue their legacy of giving.

“About 30 years ago, we made our first gift to the Hawaii Community Foundation to support basic human services, food banks and culturally important causes, including public radio and television. When we returned to Orange County, we weren't familiar with the local nonprofits, so we reached out to OCCF for guidance.”

THE THORNES



The Thornes knew they wanted to continue supporting similar nonprofits doing the essential work of human services and working to solve hunger, along with public programming and others. But they needed help in identifying local organizations and in setting up a legacy gift.

“OCCF was remarkably insightful and proactive in aligning our passions to fund organizations and causes that are important to us—ones we wanted to

sustain as long as possible to make a real difference.”

Today, the Thornes will continue to support these important causes—even after their lifetimes—through a legacy gift that will fund local organizations including Second Harvest Food Bank of Orange County, Big Brothers Big Sisters and Goodwill.



Goodwill OC



Environmental Nature Center



Big Brothers Big Sisters of Orange County

A SHARED VISION FOR A JUST AND EQUITABLE ORANGE COUNTY

MOVING FORWARD TOWARD A COMMON GOAL

In a year that awakened our nation to the effects of persistent inequity and injustice, OCCF has renewed a call to action—in service to our donors, nonprofit partners and the Orange County community. We have affirmed our commitment to create equity of opportunity, support racial healing and build a more just and civil society—starting here, in our own community, as we work together to build an Orange County that helps ALL our residents to thrive.

100 Black Men of OC



As a first step, we mobilized a Racial Justice & Equity effort with OCCF's Board, starting with a commitment to a learning process—understanding the origins of injustice and exploring models that will move the needle on equity in alignment with local demographics, needs and resources—and then building on these learnings to advance educational equity and economic opportunity for Orange County's diverse communities.

Examples of our initial work include:

- Supporting early childhood education, closing distance learning and digital gaps in third grade reading and expanding access to college and career readiness through mentoring, coaching, workforce development and scholarships to help Orange County students thrive in school and beyond.
- Building access and infrastructure to help minority-owned small businesses—especially those led by women entrepreneurs—connect to the intellectual and financial capital they need to thrive. This includes investing in early childhood education and development programs to ensure business owners and Orange County families have access to safe, high-quality child care.

The G.R.E.E.N. Foundation



EMBRACING OC'S AFRICAN AMERICAN COMMUNITY

On June 19, 2020, OCCF Executive Vice President and COO Tammy Tumbling invested her personal resources to launch the African American Alliance Fund at OCCF to raise awareness about systemic racism and to support programs designed to improve outcomes in education, health and human services, economic development and civic engagement.

The Fund awarded initial grants to four organizations serving Orange County's African American communities through programs focused on mentoring, civic engagement and education. The Alliance Fund is supporting 100 Black Men of OC's Passport to the Future Program, which serves African American males in grades 6–12 with mentorship and college preparation; a partnership between Community Action Partnership OC and Alpha Phi Alpha to increase voter participation; the G.R.E.E.N. Foundation's work for accurate representation through Census outreach and the National Society for Black Engineers to help prepare African American students for graduate-level education.

With broad community and corporate support, the African American Alliance Fund is the first of a lasting commitment to invest in the promise and potential of all of Orange County's diverse communities. Its growth reflects a unified spirit for OC to tackle barriers to opportunity, now and for generations to come.

“

AS LONG AS POVERTY, INJUSTICE AND GROSS INEQUALITY PERSIST IN OUR WORLD, NONE OF US CAN TRULY REST.

”

NELSON MANDELA

WHAT EQUITY MEANS TO US

“

Equity is about fairness. Equity is where we all have equal access and resources. Equity is where our future is only determined by our own actions and not by our cultural, racial, gender or socio-economic backgrounds.

”

RACHID CHAMTIEH
OCCF Board, Finance Chair
Deloitte & Touche LLP



“

Equity means fair and impartial access to opportunity in our community, including education, justice, banking, real estate, services and health care fundamentally. Equity also means seeing value in each other without the imposition of unconscious bias.

”

KATE DUCHENE
OCCF Board
RGP



Reshma Block
Chair
Block Family Foundation

Daniel Bolar
Vice Chair
Armanino LLP

Rachid Chamtieh
Finance Chair
Deloitte & Touche LLP

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



OCCF GOVERNANCE

OUR MISSION

To *inspire* a passion for lifelong philanthropy, faithfully steward the *intentions* of our donors and catalyze sustainable community *impact*.

BOARD OF GOVERNORS



- 01 Herbert M. Bedolfe
Marista Foundation
- 02 DeAnna Colglazier
Community Strategist
- 03 Kate Duchene
RGP
- 04 Paul Kagoo
Western Digital Corporation
- 05 Dr. Alberto Manetta
UC Irvine School of Medicine
- 06 Dr. Maria Minon
Retired, CHOC Children's
- 07 Arnold Pinkston
Edwards Lifesciences
- 08 Keith Swayne
Keith and Judy Swayne Family Foundation
- 09 Susanna Vakili
Marriage and Family Therapist
- 10 Paul C. Westhead
Rimrock Capital Management, LLC
- 11 Shelley Hoss
President & Chief Executive Officer
- 12 Tammy Tumbling
Executive Vice President & Chief Operating Officer
- 13 Tracy Branson
Chief Financial Officer
- 14 Todd Hanson
Vice President Center for Engaged Philanthropy
- 15 Cathleen Otero
Vice President Donor Relations & Programs



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