

THE
WAY

FORWARD



ANNUAL REPORT 2021

GIVING OUR ALL FOR ORANGE COUNTY'S FUTURE



*"Real generosity toward the future
lies in giving all to the present."*

—Albert Camus



Daniel Bolar *Shelley M. Hoss*

Daniel Bolar
Board Chair

Shelley M. Hoss
President & CEO

THE WAY FORWARD

At the Orange County Community Foundation, we believe in the power of inspired, informed giving to pave the way forward for our community. After a year in which the most vulnerable among us suffered the greatest losses, our donors continue to transform lives through thoughtful, innovative, and strategic philanthropy. Together, we are helping move Orange County forward — bringing the best of the head and the heart to our community's greatest challenges.

OCCF will always be a passionate and dedicated partner, resource, and guide for those working to create a stronger, healthier, more vibrant Orange County for all.

FOR OUR DONORS

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

FOR OUR NONPROFIT PARTNERS

We will be a trusted and valued resource to advance your work.

FOR OUR COMMUNITY

We will continue to build bridges of opportunity, equity, and justice so that all have the opportunity to thrive.

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

Let's build the way forward, together.



2021 BY THE NUMBERS

FOR THE YEAR ENDED
JUNE 30, 2021

\$830_M
IN CUMULATIVE GRANTING
SINCE INCEPTION

To view OCCF's 2021 audited financial statements, please visit www.oc-cf.org or call (949) 553-4202 to receive a copy by mail.

\$98_M

IN GRANTS &
SCHOLARSHIPS AWARDED

\$106_M

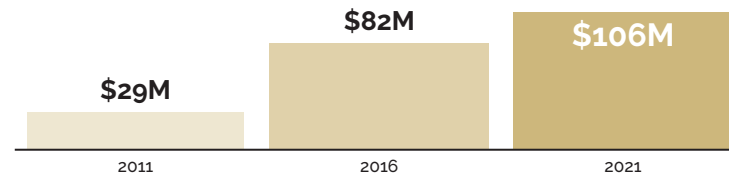
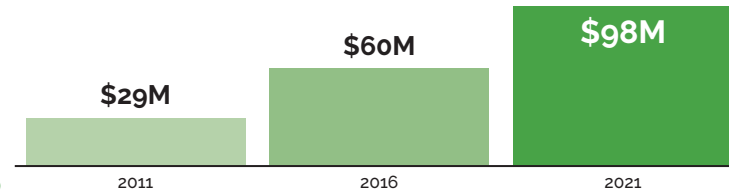
IN CONTRIBUTIONS

\$514_M

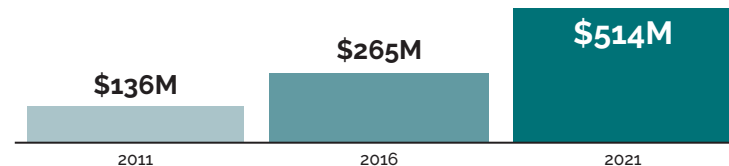
IN ASSETS

AMONG MORE THAN **780** U.S. COMMUNITY FOUNDATIONS

TOP 2% IN
GRANTMAKING

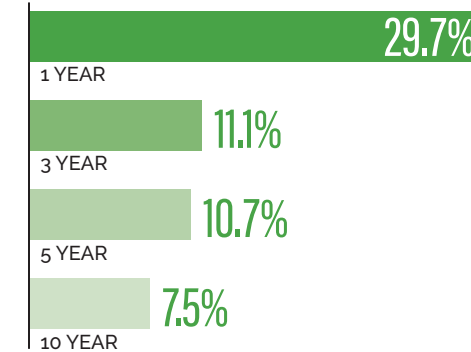


TOP 7% IN
ASSETS



INVESTMENT PERFORMANCE

Annualized returns (6/30/2021)



SUSTAINABLE INVESTING

Last 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. The 1 year return at 6/30/2021 is 31.5% and the return since inception (1/1/2020) is 20.9%.

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

1 YEAR
RETURN

31.5%

RETURN SINCE
INCEPTION

20.9%

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*

Bill Cvengros
*Chief Executive
Officer of SJC Capital*

Jason Howard
*Managing Director,
Investments, GCM
Grosvenor*

Kristen Monson
*Trustee, UCI
Foundation*

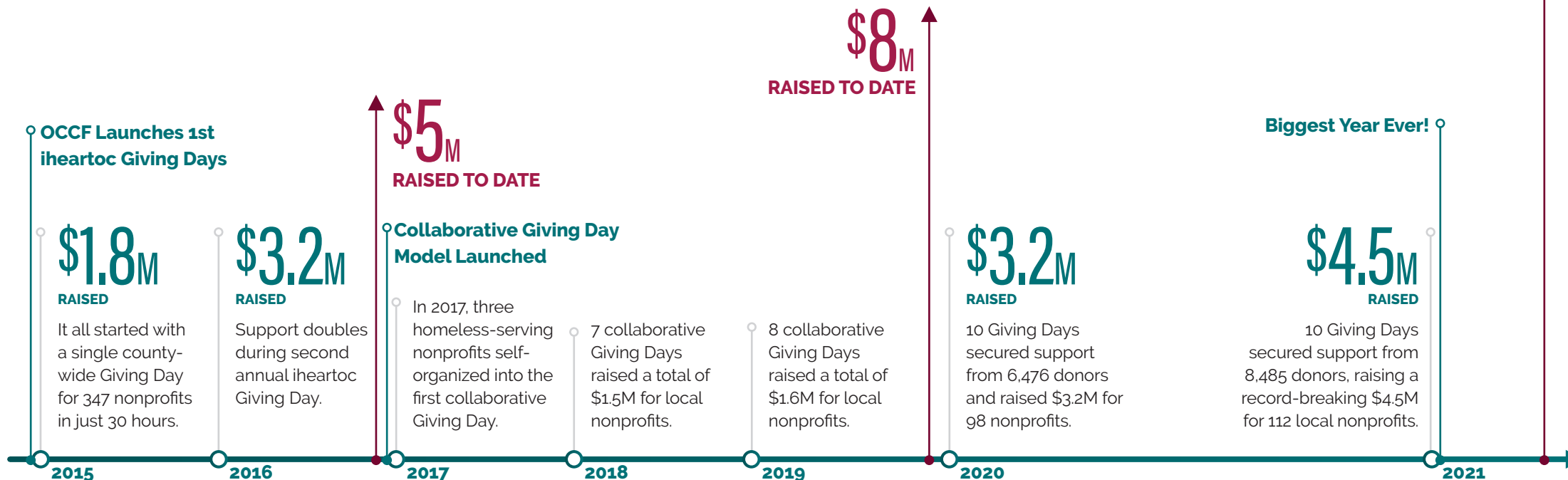
Greg Palmer
*Managing Partner,
GPalmer &
Associates*



GIVING DAYS GROW THE GOOD!



OCCF first challenged Orange County residents to “give where their heart lives” during the inaugural iheartoc Giving Day in 2015. It was our 25th anniversary gift to our community. The goal of the countywide day of giving was to inspire residents to show their love for local nonprofits by donating to their favorite charities or causes via iheartoc.org.



HELP THEM HOME

The first collaborative group to utilize the new model of Collaborative Giving Days, Help Them Home supports Orange County's most vulnerable residents in need of shelter and housing. Since 2017, Help Them Home has raised \$5.5 million for 20 nonprofit partners serving on the frontlines of need in Orange County.



PRESERVING DIGNITY

A Giving Day for nonprofits serving OC's older adults in need, Preserving Dignity supports meals, housing, domestic violence services, hospice care, engagement opportunities, caregiver support, and more. Since 2018, Preserving Dignity has raised \$897,644 for our vulnerable older residents.

PROTECT & PRESERVE

Protect and Preserve is a collaborative of local nonprofits with a shared commitment to environmental education and conservation. Since 2019, Protect and Preserve has raised \$367,458 for 7 nonprofit organizations safeguarding Orange County's invaluable natural resources.



THE FUTURE IS WORKING

Inspired by projections of 17,000 middle-skills jobs to become available in Orange County over the next decade, OCCF launched a Workforce Development Initiative in 2019 to help graduating high school seniors, disconnected older youth and underemployed young adults acquire the skills and credentials needed to secure in-demand, high-quality jobs aligned with the needs of local employers.

We are building talent pipelines for high-growth industries including healthcare, advanced manufacturing and information technology through strategic partnerships with:

- **Educational institutions:** Training and certification
- **Nonprofits:** Outreach, soft skills training, and support to help students stay on track
- **Employers:** Mentorship and on-site experience leading to potential employment

Investing in Orange County's high-potential workforce is one of the most promising paths toward the economic and civic health of our region. Let's keep working together to ensure that Orange County sets the bar for an innovative and inclusive economy that allows our entire community to thrive.



HIGH SCHOOL INC.

High School Inc. received funding to support their College and Career Coach and create a work-based learning opportunity in partnership with Children's Health of Orange County (CHOC) to introduce their students to emerging occupations in the Healthcare IT industry.



FULLERTON COLLEGE

Fullerton College received support to develop the nation's first Drone Apprenticeship program in collaboration with the California Division of Apprenticeship Standards, incorporating a scholarship and microfinance loan component for students to acquire the drones needed to complete their training at no- or low-cost.

SADDLEBACK COLLEGE

A grant to Saddleback College will support the creation of a talent pipeline for retail and business sales entry-level positions at Cox, opening the door to opportunities for career growth with this dynamic telecommunications employer.

\$1.3M

AWARDED

22

PARTNER ORGANIZATIONS

120

CERTIFICATIONS COMPLETED

LEGACY PLANNING KEEPS YOUR VISION MOVING FORWARD

OCCF is honored to work with donors to steward legacies of generosity that will last for generations to come. We currently steward more than 100 Legacy Funds for donors who have chosen OCCF to ensure that their philanthropic vision lives on beyond their lifetime. Whatever your cause, whatever your desire for impact, OCCF offers options for making your mark through a well-crafted philanthropic plan. Our flexible approach means your philanthropic intent will be honored and fulfilled, forever, exactly as you wish.

Legacy Fund donors Malli and Rani Varanasi

LEGACY FUNDS AT OCCF



Easy. Take comfort in knowing your Legacy Fund is established and ready to carry out your charitable wishes once your estate gift transfers to OCCF. You can direct your gift to support multiple causes through one simple process.



Flexible. You can modify your fund and plan future gifts on an ongoing basis without the effort and expense of revising your Trust or Will. Any changes you wish to make after establishing your philanthropic guidelines can easily be made, at no cost, by contacting OCCF.



Tax-Efficient. Charitable gifts minimize overall tax obligations related to your estate, and OCCF can accept a full array of assets to optimize estate tax planning.



Your Investment in the Future. Your gift can be invested for long-term growth and continue to have a lasting impact in the community, either in perpetuity or for an established period of years.



Family Connections. You can name family members as advisors to your Fund, transforming your legacy gift into a powerful tool for collaboratively engaging family and next generations through philanthropy.

To learn more about establishing a Legacy Fund at OCCF, contact Margita Blattner at mblattner@oc-cf.org.

"If you're going to live, leave a legacy. Make a mark on the world that can't be erased."

- Maya Angelou



Shelley M. Hoss
President & Chief
Executive Officer



Tammy Tumbling
Executive VP &
Chief Operating
Officer



Tracy Branson
Chief Financial
Officer



Todd Hanson
VP, Center for
Engaged
Philanthropy



Cathleen Otero
VP, Donor Relations
& Programs

LEADERSHIP TEAM



Margita Blattner
Sr. Dir., Philanthropic
Strategy



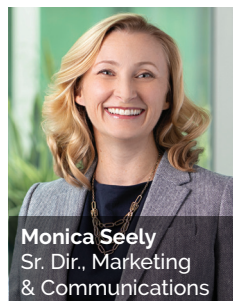
Carol Ferguson
Director, Donor
Relations & Programs



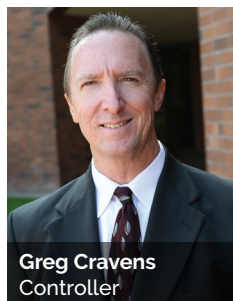
Keri Mesina
Director, Center for
Engaged Philanthropy



Elizabeth McKibbin
Director, Gift
Planning



Monica Seely
Sr. Dir., Marketing
& Communications



Greg Cravens
Controller



Justin Foster
Director, Information
& Technology



Sharon Johnson
Director, People &
Culture

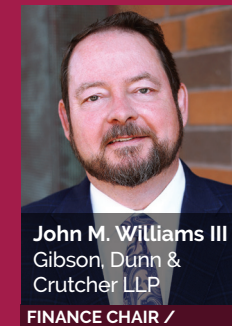
BOARD OF GOVERNORS



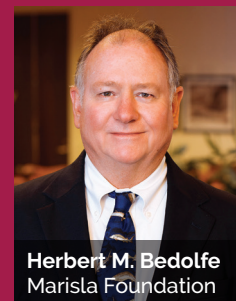
Daniel Bolar
Armanino LLP
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Rachid Chamtieh
Deloitte & Touche LLP
VICE CHAIR



John M. Williams III
Gibson, Dunn &
Crutcher LLP
FINANCE CHAIR /
SECRETARY



Herbert M. Bedolfe
Marisla Foundation



Reshma Block
Tricon Residential



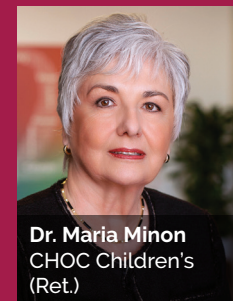
DeAnna Colglazier
Community
Strategist



Kate Duchene
RGP



Paul Kagoo
Western Digital
Corporation



Dr. Maria Minon
CHOC Children's
(Ret.)



Arnold Pinkston
Edwards
Lifesciences



**Ambassador
Gaddi H. Vasquez**
Edison International
& So Cal Edison (Ret.)



Paul C. Westhead
Rimrock Capital
Management, LLC

OUR MISSION

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



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949.553.4202 | oc-cf.org | ocnonprofitcentral.org

    @OCCCommunityFdn



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