

ANNUAL REPORT **2022**

MOMENTUM **FOR GOOD**



AMPLIFYING THE IMPACT OF GIVING IN ORANGE COUNTY AND BEYOND



The Shea Center



Goodwill of Orange County

“ All that is important is this one moment in movement. Make the moment important, vital, and worth living. Do not let it slip away unnoticed and unused.

” **MARTHA GRAHAM**
*Legendary dancer,
choreographer, and creator
of modern dance technique*



Daniel Bolar
Board Chair
Armanino LLP



Rachid Chamtieh
Vice Chair
Deloitte & Touche LLP



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



Shelley Hoss
President & Chief Executive Officer



Tammy Tumbling
*Executive Vice President &
Chief Operating Officer*



Tracy Branson
Chief Financial Officer

AMPLIFIED GIVING. MOMENTUM FOR GOOD.

At the Orange County Community Foundation, we partner with our donors and community to combine giving strategy, community intelligence, enduring relationships, and heartfelt intention to amplify the power of giving and its profound result: momentum for good in Orange County, and beyond.

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 know that too many face a daily struggle to survive. We will continue to build bridges of opportunity, equity, and justice so that all have the opportunity to thrive.

We bring together the
best of the head and
the heart to produce the
momentous change and
progress our community,
and our world, demands.



NeighborWorks Orange County

FINANCIALS

2022
BY THE NUMBERS*

\$906
MILLION IN CUMULATIVE
GRANTING SINCE
INCEPTION

*for the year ended 6/30/22

FY22 FINANCIAL SNAPSHOT
(in Millions)



AMONG MORE THAN
780 U.S. COMMUNITY
FOUNDATIONS:

3rd
MOST ACTIVE
GRANTMAKER

TOP 7%
IN ASSETS

INVESTMENT
DISCIPLINE &
STEWARDSHIP

OCCF diligently stewards the charitable assets entrusted to our care through a robust investment process guided by our experienced Investment Committee and independent investment advisor Cambridge Associates. OCCF manages investments to maximize earnings over time while minimizing downside risk. A diversified portfolio of stocks, bonds, mutual funds and alternative investments, managed with astute and proactive attention, protects the long-term value of the charitable assets in our care.

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



INVESTMENT PERFORMANCE

annualized returns (6/30/2022)



INVESTMENT COMMITTEE

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

Michael Berchtold
CEO
Berchtold Capital Partners

Vicki Booth
President
Ueberoth Family Foundation

Wendy Cupps
Co-Founder & Trustee
Golden Eagle Foundation

Bill Cvengros
Chairman
National Retirement Partners

Richard Gadbois
Argyle Street Management Limited

Paul Heeschen
Managing Partner
Heeschen & Associates

Jason Howard
Managing Director Investments
GCM Grosvenor

Kayhan Mirza
Partner
Retired
Goldman Sachs

Kristen Monson
Retired
PIMCO

Greg Palmer
Managing Partner
GPalmer & Associates

THE POWER OF
GIVING TOGETHER

Started in 2017, Help Them Home is 24-hour online giving event that supports nonprofits with a focus on people experiencing or at risk of homelessness. Help Them Home pioneered the collaborative giving model for the Orange County Community Foundation's i♥OC Giving Day program. Fueled by the power of social media, email marketing, and collaboration, what started as a handful of non-profits coming together to raise both awareness and support for their missions on behalf of our most vulnerable residents, has evolved into a county-wide giving day that now includes more than 20 participating non-profits and more than \$2 million collectively raised each year. Each participating non-profit is united in its ultimate goal: housing and supporting people at risk of or experiencing homelessness in our community.



HomeAid Orange County



HomeAid Orange County

“ I feel so much stronger and more confident than I have ever felt before, I know I can succeed with anything that life throws at me, thank you!

— FAMILIES FORWARD CLIENT

“ I came into Thomas House broke with nothing to my name. Now I own a vehicle and am currently living in my own condo in Garden Grove.

— THOMAS HOUSE CLIENT

2022
PARTICIPATING
NONPROFITS

- American Family Housing
- Casa Teresa
- Charity On Wheels
- City Net
- Colette's Children's Home
- Families Forward
- Family Assistance Ministries
- Family Promise of OC
- Friendship Shelter
- Grandma's House of Hope
- HomeAid Orange County
- Homeless Intervention Services of OC
- Illumination Foundation
- Mercy House Living Centers
- Our Fathers Table
- Pathways of Hope
- Robyne's Nest
- Serving People in Need
- South County Outreach
- StandUp for Kids, Orange County
- The Eli Home
- The Salvation Army Orange County
- Thomas House Family Shelter
- WISEPlace

\$8.4 M

RAISED SINCE
2017

24

PARTICIPATING
NONPROFITS

CIELO: HELPING SMALL BUSINESS DREAMS GO BIG



CIELO recently launched its first fundraiser, the wildly successful CIELO Night Market! 160+ supporters, community and business leaders, and clients came out with great energy, empathy, and passion.

THE EVENT HELPED
RAISE \$80,000

to seed the newly formed OC MicroFund.

The OC MicroFund is a critical tool for CIELO clients to build up their small businesses, support their families and community, and make an impact in Orange County!

CIELO AIMS TO RAISE
\$250,000

to support 100 new businesses owned by immigrant and BIPOC individuals through micro-grants to cover start-up costs.

IMPACT SINCE 2016

3,500+
INDIVIDUALS
SERVED

300+
BUSINESSES
LAUNCHED

5 YEAR PROJECTED IMPACT

450
NEW BUSINESSES

2,200
NEW JOBS
CREATED

\$249M
INCOME
GENERATED

\$500M
TOTAL ECONOMIC
OUTPUT GENERATED

CIELO connects enterprising people with the tools, resources, and trusted mentorship to turn multiple side gigs into a single, thriving community business. No more living paycheck to paycheck, CIELO helps to create a strong, small-business ecosystem in Orange County, help individuals earn a dignified wage, and boost the local economy for all.

ON MARCH 27, 1996, UCLA JUNIOR CHERESE MARI LAULHERE LOST HER LIFE IN A TRAGIC ACCIDENT IN AGRA, INDIA WHILE TRAVELING WITH SEMESTER AT SEA.

To honor their daughter's life, Chris and Larry Laulhere established the Cherese Mari Laulhere Foundation to enrich the lives of children, adults and families through education, cultural and performing arts, and medical and health-related causes. Learn more at cherese.org

In addition to their Foundation, the Laulheres had established a donor-advised fund through a financial institution to support their granting. Unfortunately, they had difficulties making the grants they intended through the DAF provider so they appealed to their attorney, Rick Salus of Palmieri Tyler, for assistance. Rick had referred several clients to OCCF for support with their philanthropic goals, and he knew that OCCF would be able to help the Laulheres.

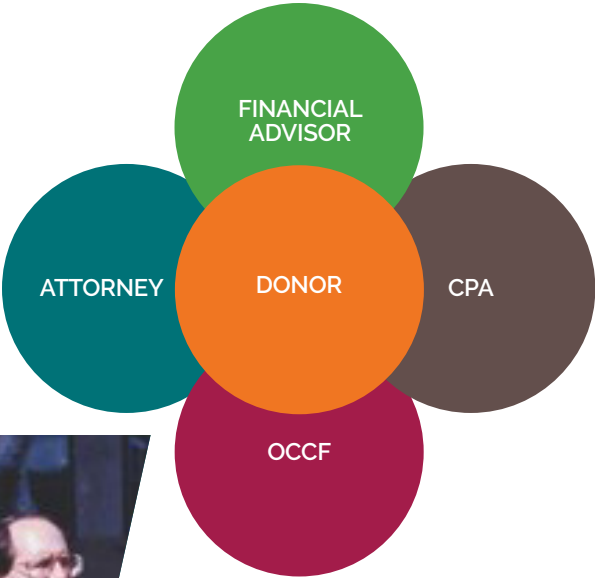
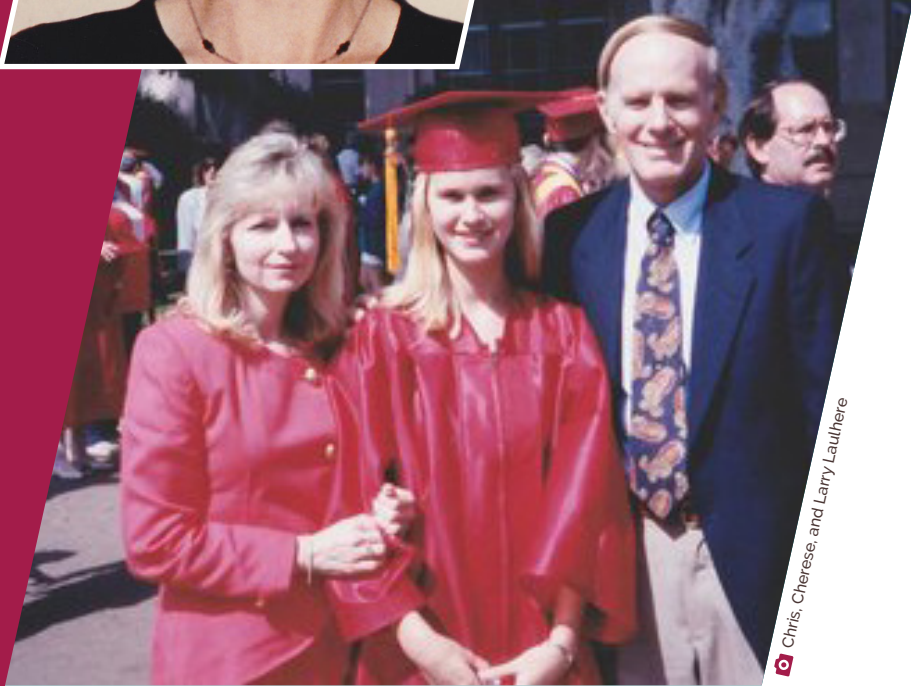
After meeting with the Laulheres, OCCF's team clearly saw how to free them from the challenges they were encountering and knew exactly how to support their generous grantmaking to local nonprofits. Removing barriers to giving and helping both donors and nonprofits thrive with our partnership is the heart of OCCF's mission, and we were thrilled to help the Laulheres fulfill their passionate commitment to honoring their daughter Cherese.



“A financial firm managing my clients' donor-advised fund was preventing them from using the funds for their intended charitable purpose. I called Shelley Hoss and the OCCF team, and they seamlessly orchestrated the transfer to a new fund at OCCF, enabling my client to complete a major gift that provides a great benefit to the Orange County community.

— RICK SALUS

COLLABORATION, COOPERATION, AND COMMUNICATION: Building a team that helps you bring your charitable vision to life.



PHILANTHROPY IS OUR BUSINESS. WE'RE HERE TO HELP

We get to know our partners and address the unique needs of our donors. We actively collaborate with advisors to ensure donors' financial, legal, and tax needs are incorporated into their charitable plans.

BOARD OF GOVERNORS



Daniel Bolar *Board Chair*
Armanino LLP



Rachid Chamtieh *Vice Chair*
Deloitte & Touche LLP



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



Herbert Bedolfe
Marisla Foundation



Reshma Block
Tricon Residential



DeAnna Colglazier
Community Strategist



Kate Duchene
RGP



Paul Kagoo
Western Digital Corporation



Joanna Kong
Sun Family Foundation



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



Kristen Monson
Pacific Investment Management Company (Ret.)



Arnold Pinkston
Edwards LifeSciences



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



Paul C. Westhead
Rimrock Capital Management, LLC



Bob Whalen
Stradling Yocca Carlson & Rauth

OUR MISSION: To **INSPIRE** a passion for lifelong philanthropy,
faithfully steward the **INTENTIONS** of our donors
and catalyze sustainable community **IMPACT**.

OCCF STAFF



Priscilla Aguilar



Dan Ball



Colleen Barney



Jenny Lucatero



Keri Mesina



Thomas Moore



Austin Muckenthaler



Margita Blattner



Liz Brown



Mayra Chavez



Elaine Chen



Cathleen Otero



Nicole Perry



Suzanne Preston



Treena Salerno



Greg Cravens



Rachel Donawerth



Carol Ferguson



Lindley Hanley



Shaakira Satterwhite



Asia Scott



Monica Seely



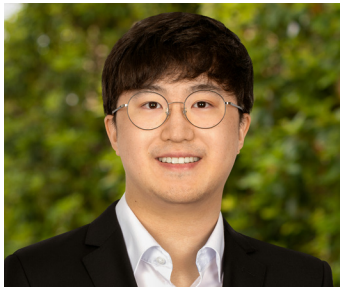
Rachel Shelley



Holiday Heller



Sharon Johnson



Kevin Kim



Rachel Lowenthal



Briana Stickney



Lisa Wilterink

LEARN MORE about our team at
oc-cf.org/staff



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