



## 2023 Impact Philanthropy Program Outline

**PURPOSE:** The Impact Philanthropy program provides opportunities to learn about community needs and philanthropic strategies through collaborative grant making.

**FOCUS:** Based on feedback from the 2022 member survey, the 2023 focus area will be: ***Environmental Awareness in Orange County***. Members will be narrowing the focus area down to a more specific topic such as climate change, habitat preservation, coastal conservation, etc.

This topic will give our members a glimpse into the nonprofits that are protecting Orange County's most vulnerable ecosystems. Here are a few things to keep in mind regarding this topic:

1. Orange County faces environmental issues such as decreased air and water quality, coastal contamination, and lack of open space.
2. A new statewide survey by the nonpartisan Public Policy Institute of California finds most residents consider drought, wildfires and climate change as the biggest environmental issues facing natural habitats and ecosystems.

### **PROGRAM TIMELINE:**

May through October 2023. Dates will be set at the beginning of the program and shared with members.

<b>Meeting</b>	<b>Date</b>	<b>Time</b>
Kickoff Lunch & Philanthropy 101 Refresher	Tuesday, May 9 <sup>th</sup>	12:00 pm – 2:00 pm
Non-Profit Selection Mtg.	Tuesday, May 23 <sup>rd</sup>	12:00 pm – 1:00 pm
Meet the Nonprofits "Speed Dating"	Wednesday, June 28 <sup>th</sup>	12:00 pm – 2:00 pm
Summer Workshop & Happy Hour	Wednesday, July 26 <sup>th</sup>	3:00 pm – 5:00 pm
Site Visits	Tuesday, August 15 <sup>th</sup>	9:00 am – 10:30 am
Site Visits	Tuesday, September 12 <sup>th</sup>	8:00 am – 10:00 am
Grant Review Meeting	Tuesday, October 3 <sup>rd</sup>	12:00 pm – 2:00 pm
Grant Reception	Tuesday, October 17 <sup>th</sup>	3:00 pm – 4:30 pm

## PROGRAM OUTLINE:

- **Kickoff Lunch & Philanthropy 101 Refresher (2 hrs./MAY 9<sup>th</sup>)** – Member introductions and reflections, lunch, and open discussion of this year’s topic. During the second hour, OCCF will provide a toolkit ([Nonprofit Central](#), *vetting 101*, *reference articles*, etc.) with a quick Philanthropy 101 refresher on trust-based philanthropy and effective grantmaking. This will assist members in their research for nonprofits to recommend at the next meeting.
- **Nonprofit Selection Meeting (1 hr./MAY 23<sup>rd</sup>)** - At this meeting held via Zoom, members are encouraged to recommend 1-2 environmental nonprofits for participation in the program and why they chose them. A discussion and selection of up to 6 nonprofits will be decided based on the tools the members were given at the prior meeting.
- **Meet the Nonprofits (“Speed Dating”) (2 hrs./JUNE 28<sup>th</sup>)** - Members will have a chance to meet all the nonprofits being considered for this year’s grant program. Each nonprofit will be asked to submit a brief letter of intent (LOI) prior to the meeting for Impact Philanthropy members to review. At the meeting, group members will rotate between representatives from each nonprofit and will have a chance to speak with them in small groups during timed intervals.
- **Summer Workshop & Happy Hour (2 hrs./JULY 26<sup>th</sup>)** - This will be an opportunity to participate in an onsite educational workshop led by local experts in the environmental field, tour a local farm, discuss environmental issues in OC, and join in locally sourced spirits at the end to get to know your fellow members better.
- **Site Visits (AUGUST 15<sup>th</sup> & SEPTEMBER 12<sup>th</sup>)** – The group may visit the participating nonprofits in-person, or a virtual site visit may be scheduled. Some site visit dates may include multiple organizations.
- **Grant Review (2 hrs./OCTOBER 3<sup>rd</sup>)** – The group will review the nonprofit grant proposals and determine this year’s grantees and award amounts. You’ll be working as a team to collaborate, communicate, and vote based on the insight gained over the last 6 months.
- **Grant Reception (1.5 hrs./OCTOBER 17<sup>th</sup>)**– Impact Philanthropy members will present the grant checks to the 2023 grantees at a year-end gathering. Members are encouraged to bring a friend, colleague, family member that may be interested in joining the Impact Philanthropy program next year. Members and nonprofits will celebrate the great work they were able to accomplish through collaborative grant making.

## MEMBERSHIP & RECRUITMENT:

Membership in the group is by invitation. Let us know of anyone you would like to recommend, and we can provide the program materials and add them to the group distribution list (or provide you with materials if you would like to reach out). New members should join the group by the June meeting.

## **GRANTING & MEMBERSHIP:**

To support the collaborative grant-making component of the program, members contribute to the Impact Philanthropy Fund grant pool. These contributions are then matched by the OCCF board up to \$30,000. The total combined contributions are granted at the end of the program to nonprofits selected during the grant review meeting. There is also a separate membership fee that supports the direct program costs.

- The suggested contribution to the Impact Philanthropy Fund grant pool is \$1,000 - \$2,500, although you may contribute more if you'd like to make a greater impact.
- A separate membership fee of \$100 per member covers the direct costs for programming and events.
- Contributions and membership fees qualify as a charitable distribution to OCCF (a public charity). Payment options include donor advised funds, private foundation, check, or credit card. Corporate matching gifts are also accepted.

## **How to Submit Your Contribution and Membership Fees**

You can make your Impact Philanthropy membership and contribution online via credit card, check, through a donor-advised fund or private foundation:

1. Online: Visit <https://donor.oc-cf.org/make-a-donation>. Under the designation drop down menu, select "Impact Philanthropy Group" and beneath additional information, please note "membership contribution" in the comments section. You will receive verification at the email address you provide.
2. Via Check: Make check payable to Orange County Community Foundation and write "Impact Philanthropy" in the memo section. Mail checks to:

Orange County Community Foundation  
Attn: Impact Philanthropy  
4041 Arthur Blvd., Suite 510  
Newport Beach, CA 92660

3. You can also contribute through a donor-advised fund, private foundation, or corporate matching gift program (if applicable).

**For more information about joining Impact Philanthropy,  
please contact Philanthropic Advisor, Lindley A. Hanley at:  
[impact@oc-cf.org](mailto:impact@oc-cf.org) or 949-553-4202 ext. 270**