

For Good For Ever

ANNUAL REPORT 2023





The best time to plant a tree was 20 years ago. The second best time is now.

- CHINESE PROVERB



For Good. For Ever.

Community is the heart of our mission at the Orange County Community Foundation. Since our founding in 1989, philanthropists, business leaders, local residents and nonprofit partners have joined us in building a stronger, more vibrant community for all who call Orange County home.

This has been a year of transformation for OCCF as a place of welcome and shared connection for our donors, nonprofit partners and community leaders. We found a **new home** at the Atrium building in Irvine for our growing team, **re-designed our website** to provide a better digital experience for all we serve, **and launched a new online portal for OCCF fund holders** to amplify the ease and impact of their giving. We can't wait to hear what you think!

And finally, we refreshed our mission statement to reflect our deep and lasting commitment to the Orange County community.

In the following pages you will learn more about our new mission, 2023 highlights and achievements, financial results, and milestones in our OC Nonprofit Central and ConnectOC initiatives.

Thank you for your partnership and support in growing the good! It remains our greatest joy and honor to serve as Orange County's Community Foundation—for good, for ever.



Rachid Chamtieh Board Chair





Shelley M. Hoss Chief Executive Officer

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As we celebrate a year of growth and change, OCCF has adopted a new mission statement to honor our deep and lasting commitment to the Orange County community.

Transforming our Community's Heartfelt Intention into Greater Impact for Good.

Our community is abundant with heartfelt intention: generous donors and partners who envision a better future for our region, nation, and world. Orange County's willingness to give and desire to create long-term change are inspiring. But ensuring that today's giving results in lasting impact requires more than good intentions.

It depends on informed strategy, deep community knowledge, and enduring commitment. It requires the best of both head and heart. This is where OCCF comes in, harnessing the generosity, passion, and desire for good in our community and transforming it into meaningful impact.

We amplify the results of our donors' giving and partners' visions by guiding charitable investments, mobilizing key players, applying our community intelligence, and leveraging deep relationships with visionaries, change-makers, and leaders. We're experts who recognize promise, open opportunity, and problem-solve with courage... powering the profound progress the future of our community—and our world—demands.



2023 by the Numbers (for the year ending 6.30.23)

AMONG MORE THAN 780 U.S. COMMUNITY FOUNDATIONS 7TH
MOST ACTIVE
GRANTMAKER



TOP 7%
IN ASSETS



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



INVESTMENT PERFORMANCE

annualized returns (6.30.2023)



INVESTMENT 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

INVESTMENT COMMITTEE

Paul C. Westhead, *Chair*Rimrock Capital Management, LLC

Dan Bolar Armanino LLP (Ret.)

Vicki Booth Ueberroth Family Foundation

Wendy Cupps
Golden Eagle Foundation

Bill Cvengros National Retirement Partners

Richard Gadbois Argyle Street Management

Paul Heeschen Heeschen & Associates

Jason Howard Private Equity Investor

Kayhan Mirza Goldman Sachs (Ret.)

Kristen Monson PIMCO (Ret.)

Greg PalmerSupplemental Health Care

\$1 Billion in Grants & Scholarships Awarded Since 1989...and Growing!





A Bold Vision

On our 30th anniversary in 2019 OCCF announced a bold goal: **To reach \$1 billion in cumulative granting within 5 years**, joining only 35 other community foundations to have reached that milestone.

A Goal Achieved

Not only did we reach our goal, but we did it more than a year early and have already exceeded it by another \$50 million! More than one billion dollars in grants and scholarships have been awarded by OCCF since 1989.



Thanks to You!

Thanks to all who have invited us on their giving journey and to everyone dedicated to making Orange County a place where ALL have the opportunity to thrive, the Orange County Community Foundation reached this historic milestone.

Vision 2030 & Beyond

Join us as we **continue to grow the good in Orange County**, across the nation and around the world!



Celebrating 10 Years of Impact through OC Nonprofit Central

OC Nonprofit Central was launched in June of 2013 as Orange County's only online database of local nonprofits, created to help donors and residents better understand the local nonprofit sector and discover how to support the causes they care about most.

NONPROFITS

benefit from increased visibility as OCCF promotes the resource of Nonprofit Central with donors and regional funders, and the ability to receive contributions directly through their profile on the site.

DONORS

benefit from the ability to search nonprofits by name, service area, or geographic location. They can review up-to-date program, financial, and contact information in a one-stop format that delivers meaningful information at their fingertips.





LAUNCHED JUNE 2013

155 profiles

of nonprofits addressing a wide range of needs from education and arts to human services and the environment



AS OF JUNE 2023

550 profiles

representing the majority of staffed nonprofits in Orange County

HOW IT WORKS

OC nonprofits that request to be included are verified by OCCF staff to be a nonprofit in good standing that provide services or are located in Orange County. Approved nonprofits can utilize their profile page to showcase accomplishments, leadership and Board governance, programs and services, and conduct online fundraising.

GIVING DAYS

Organizations with profiles on OC Nonprofit Central are eligible to participate in one of OCCF's cause-specific collaborative giving days throughout the year. **OCCF Giving Days have raised more than \$25M for OC nonprofits since 2015.**



Research breaks it down. Together we can build it up.

In 2012, the Orange County Community Foundation partnered with McKinsey & Company to produce the first ConnectOC Community Report, using rigorous data analysis to examine myths and misconceptions about the OC community. ConnectOC surfaced local knowledge on three key topics: the safety net protecting our most vulnerable residents, the health and wellness of our community, and the education of our youth. The data and insights led to important findings about our community's greatest needs, promising solutions, and how philanthropy could help move the needle.

Ten years and a global pandemic later, we refreshed the ConnectOC data and found positive trends worthy of celebration as well as new areas of concern and rising need.



We invite you to explore our ConnectOC findings and how you can engage to help build an Orange County where all have the opportunity to thrive.



HEALTH AND WELLNESS

While the percentage of OC residents with health coverage has increased significantly since 2012, the health and wellness of our community faces critical gaps that we must address.



SPOTLIGHT ISSUE: YOUTH MENTAL HEALTH

Over the last two years, there has been a 71% increase in local requests for children's mental health services.

SAFETY NET

While the county's poverty rate is lower than that of the state and the nation, far too many children and families in Orange County experience housing, food and financial insecurity.



SPOTLIGHT ISSUE: FOOD INSECURITY

1 in 11 children in Orange County are food insecure.

EDUCATION

College eligibility has greatly improved over the last decade, yet the county is still facing key educational hurdles including third grade reading levels, kindergarten readiness, and more.



SPOTLIGHT ISSUE: WORKFORCE READINESS

Middle-skill job opportunities requiring less than a four-year degree have increased by 25% in OC since 2003.



EXECUTIVE TEAM

Shelley M. Hoss Chief Executive Officer



Tammy Tumbling
President



Tracy Branson Chief Financial Officer



Cathleen Otero
Chief Operating Officer

LEADERSHIP TEAM



Carol Ferguson
Donor & Community Engagement



Keri Mesina Donor & Community Engagement



Elaine Chen
Donor & Community Engagement



Greg Cravens
Finance & Administration



Uzoma Patrick Isebor Innovation & Technology



Monica Seely
Marketing & Communications



Margita Blattner
Philanthropic Strategy

DONOR & COMMUNITY ENGAGEMENT



Mayra Chavez



Rachel Donawerth



Lindley Hanley



Thomas Moore

DONOR & COMMUNITY ENGAGEMENT



Austin Muckenthaler



Briana Stickney

EXECUTIVE OFFICE



Liz Brown



Rachel Lowenthal

FINANCE



Priscilla Aguilar



Dan Ball



Nicole Perry



Suzanne Preston

INNOVATION & TECHNOLOGY



Kevin Kim

MARKETING & COMMUNICATIONS



Brooke Dorsey



Asia Scott



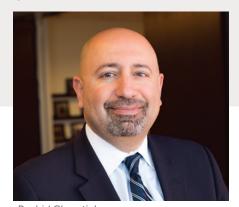
Jenny Lucatero

BOARD GOVERNANCE

Board members fulfill their governance responsibilities by applying their skills and expertise to ensure most effective oversight and guidance of OCCF's mission.

Board Officers 2023-2025

CHAIR



Rachid Chamtieh Deloitte & Touche LLP

VICE CHAIR & SECRETARY



John M. Williams III Gibson, Dunn & Crutcher LLP

FINANCE CHAIR



Kate Duchene



Daniel Bolar Past Chair Armanino LLP (Ret.)



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



Save the Date

Please mark your calendars for our 35th Anniversary Celebration!

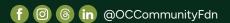
November 21, 2024 6:00 PM

MORE DETAILS TO COME





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