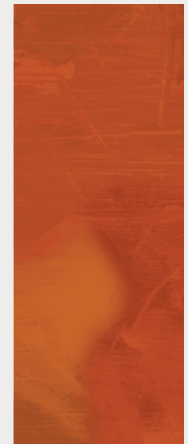


Together We Rise

THE POWER OF **COMMUNITY**



OUR MISSION

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

“

The greatness
of a community
is most accurately
measured by the
compassionate
actions of its
members.

- CORETTA SCOTT KING





At the heart of the Orange County Community Foundation is a steadfast belief in the transformative power of community.

Our donors, through their thoughtful and strategic philanthropy, are catalysts for positive change, fostering vibrant, resilient communities in Orange County, across the country and around the world.

At OCCF, we are building a foundation for the future by helping donors find the causes they love, building stronger communities through collective impact, and leading the way with bold solutions. This journey of shared growth and prosperity has made OCCF one of the fastest growing and most active grantmakers among 800 U.S. community foundations, propelling us to \$1.25 billion in cumulative grantmaking since our inception.

To our donors: Your contributions are growing the good, and we are here to help you amplify your impact in Orange County and beyond.

To our nonprofit partners: We stand beside you, bringing visibility and vital resources to support your important work.

To our community: We recognize the challenges too many of our neighbors are facing, and we are dedicated to building pathways of opportunity now and for generations to come.

We hope you will join us in a shared commitment to Orange County's thriving future.



A handwritten signature in red ink, reading "John M. Williams".

John M. Williams
Board Chair



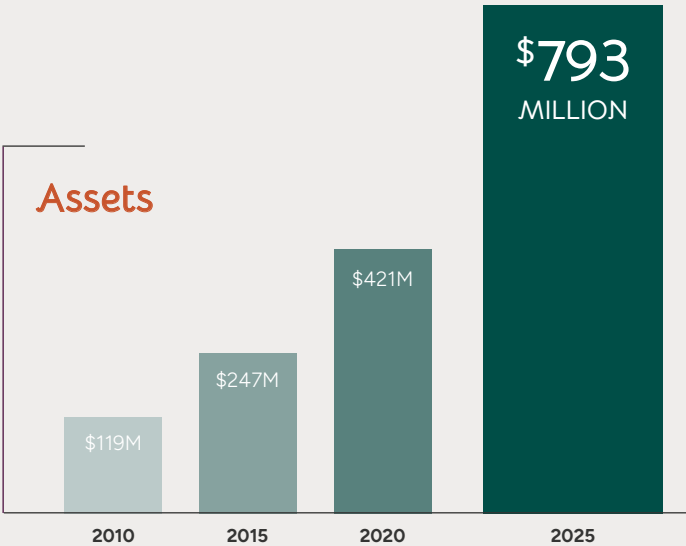
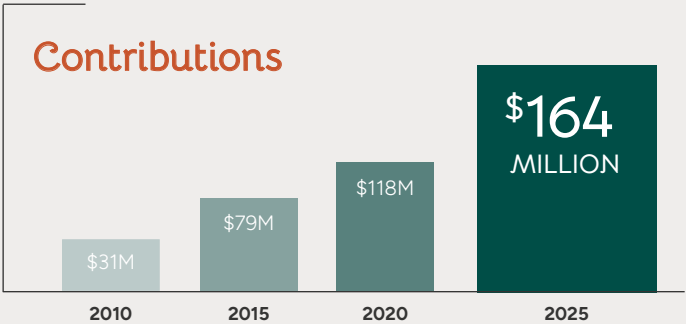
A handwritten signature in red ink, reading "Shelley M. Hoss".

Shelley M. Hoss
Chief Executive Officer

2025 by the Numbers

For the year ended 6.30.25

In an extraordinary year of growth and generosity, we are thrilled to announce a historic achievement in our grantmaking—**\$125 million in grants and scholarships** awarded, marking our highest level ever!



Home to more than **650 charitable funds** benefiting a wide range of causes, including human services, education, health and wellness, environment, the arts, and community development.



FINANCE COMMITTEE

Bob Whalen, Chair

Stradling Yocca Carlson & Rauth

Reshma Block
Compass Consulting, LLC

Dan Bolar
Armanino LLP (Ret.)

Anna Escobedo Cabral
Cabral Group

Rachid Chamtieh
Deloitte & Touche LLP

Christopher D. Tower, CPA
BDO USA (Ret.)

Fram Virjee
Emeritus President, Cal State Fullerton

Paul Westhead
Rimrock Capital Management LLC

AUDIT COMMITTEE

Anna Escobedo Cabral, Chair

Cabral Group

Dan Bolar
Armanino LLP (Ret.)

Rachid Chamtieh
Deloitte & Touche LLP

Paul Heeschen
Heeschen & Associates

Timothy Kay
Snell & Wilmer

Christopher D. Tower, CPA
BDO USA (Ret.)

Bob Whalen
Stradling Yocca Carlson & Rauth

John M. Williams
Gibson Dunn & Crutcher LLP

To view OCCF's audited financial statements, please visit www.oc-cf.org or call 949.553.4202 to receive a copy by mail.

Our goal is to invest assets for growth while protecting charitable capital for greatest impact over time.

A balanced, diversified portfolio of stocks, bonds, mutual funds and alternative investments **ensures that philanthropic capital is maximized** through all market cycles.

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 PERFORMANCE

Annualized returns 6.30.2025



As a result of OCCF's diligent investment management, the funds under our care increase through investment earnings over time, amplifying the ability of our donors to support the causes they care about most.

In FY25, a staggering \$69 million has been added to the assets under our stewardship through investment returns. That's what we call growing the good!



INVESTMENT COMMITTEE

Paul C. Westhead, Chair

Rimrock Capital Management, LLC

Bill Cvengros, National Retirement Partners

Mike Danzi, Madera Pharmaceuticals Inc.

Robert Dudley, Heeschen & Associates

Rich Gadbois, Argyle Street Management

Jason Howard, New Catalyst Strategic Partners

Kayhan Mirza, Goldman Sachs (Ret.)

Kristen Monson, Pacific Investment Management Co. (Ret.)

Cathleen Stahl, Pacific Investment Management Co.

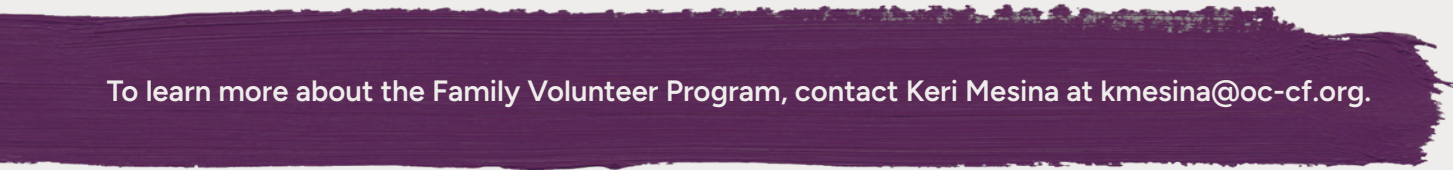
One of the most ardent desires our donors express is to cultivate a value for giving among their children and grandchildren.

Our donors are especially interested in opportunities for multiple generations to participate in hands-on volunteering together, including younger children. But these experiences are nearly impossible to organize due to scheduling and logistical hurdles for both family members and nonprofits, complicated by the fact that many nonprofits are unable to include children under the age of 18 due to their missions and confidentiality requirements.

So, what's a family to do? For those who work with OCCF, we now have the answer. Last year OCCF launched a Family Volunteer Program for our multi-generational fund holders that has raised the bar for family engagement beyond all our expectations. In its pilot year, the program grew from two families to five, involving 40 extended family members in regular hands-on volunteering opportunities.

Our families have packed food boxes and delivered holiday gifts to families in emergency shelters, created STEM education kits, assembled Joy Jars with heartfelt notes for children battling cancer, connected with older adults through music and art, and planted microgreens at a community farm.

These powerful experiences are not only opportunities for service but create pathways to deepen family connections with one another and with organizations that align with each family's values, making the experience both personal and impactful.



To learn more about the Family Volunteer Program, contact Keri Mesina at kmestina@oc-cf.org.

Greinke Family

For the Greinke family, participating in the Family Volunteer Program has been an inspiring journey. They believe that giving as a family amplifies the hope and joy shared with others. Whether through donating time, resources, or simply spreading kindness, the Greinke family finds that engaging in philanthropy together enriches their own family bonds while benefiting the community.



Murphy Family

The Murphy family is committed to inspiring the next generation. They actively involve children and grandchildren in researching philanthropic opportunities, attending grant ceremonies, and participating in volunteer events. This hands-on approach allows younger family members to see the direct impact of their efforts, fostering a personal connection to volunteerism and philanthropy.



"The Family Volunteer Program is something our family looks forward to every quarter. It has brought our family together across three generations and is something we are proud to share with our extended family. It allowed us to do something fun and meaningful in the community. It has been especially powerful for the people in my generation because we are always looking for things we can do with our kids. I like to think we are also creating young philanthropists. I want to thank OCCF for launching this amazing program and I hope that more people can benefit from it."

-Joanna Kong, The Sun Family Foundation

OCCF's Family Foundation Alliance is a network of local foundations who gather quarterly to connect, learn, and share best practices in family philanthropy.

Since its launch in 2012, the Alliance has featured nationally recognized speakers as well as local innovators bringing fresh solutions to our community's greatest challenges. Our 2025 program was an especially inspiring one, with engaging programs on Innovations in Philanthropy, a deep dive into Child and Youth Mental Health, and a warm welcome by Orange County's Vietnamese community in Little Saigon.

Innovative Philanthropy: Building a Resilient Nonprofit Sector in Orange County



Featuring insights from Lindsey Spindle, President of Samueli Family Philanthropies, and Efrain Escobedo, President & CEO of the Center for Nonprofit Management, this program explored the challenges local nonprofits face and the bold solutions philanthropy can propel, including a sneak peek at findings from the OC Nonprofit Needs Assessment, a landmark study commissioned by the Samueli Foundation with support from the Orange County Community Foundation.

Confronting The Youth Mental Health Crisis in Orange County



Led by CHOC's Dr. Maria Minon, Chief Medical Officer (retired) and Dr. Heather Huszti, Chief Psychologist, this program offered a profound and timely discussion on the mental health crisis facing children and youth in Orange County. In addition to our medical experts, speakers from the nonprofit and education fields shared their insights and promising solutions aimed at early intervention and long-term improvement in mental health outcomes for our children and youth, and how philanthropy can help move the needle.

Exploring the Heart of OC's Vietnamese Community



Hosted by OCCF Board member Tam Nguyen of Advance Beauty College, this unique program in Little Saigon, home to the largest Vietnamese population outside of Vietnam, offered an immersive experience with one of Orange County's most vibrant communities. A guided tour of Bao Quang Temple by Head Abbot Thich Thong Hai highlighted spiritual traditions and historical roots that continue to flourish in Vietnamese American life today. A family-style lunch and meaningful conversation followed at Brodard Chateau, where members learned from local leaders about evolving challenges, triumphs, and needs within the Vietnamese community.

To learn more about the Family Foundation Alliance, visit oc-cf.org/FFA.

CELEBRATING MILESTONES

African American Alliance Fund

5TH ANNIVERSARY: Empowering Change & Building Community

Founded in 2020, the AAAF has emerged as a beacon of hope and support for African American communities. From its inception, the Alliance Fund has garnered support from a broad array of individuals reflecting diverse backgrounds and life experiences.

The Alliance Fund has made a significant impact through its support of nonprofit organizations and their projects that focus on Education, Human Services, Civic Engagement, Health, Economic Opportunity, and Professional Development. More than \$1 million has been granted to 81 nonprofit organizations, locally, nationally, and around the world. Grantee organizations have served approximately 33,000 individuals through support from this fund.

One of the fund's pioneering efforts was to convene African American leaders from Orange County and surrounding areas. These leaders meet quarterly to share resources, discuss pressing issues, and engage in peer networking and coaching. This collaborative environment allows participants to exchange best practices and lessons learned, enhancing the effectiveness of their initiatives.

To learn more about the African American Alliance Fund, visit oc-cf.org/AAAF.



iheartoc Giving Days

10TH ANNIVERSARY: Giving Where Your Heart Lives

Each year, OCCF's iheartOC Giving Days bring vital support to nonprofits working to make Orange County a better place for all who call our county home.

Launched as a single countywide day of giving in 2015, OCCF's initiative has evolved into a year-long series of Giving Days, bringing together donors and nonprofits to address Orange County's greatest needs. These collaborative Giving Days use an online giving platform to match local donors to Orange County nonprofits with shared missions – from homelessness and workforce development to preserving ecosystems and supporting at-risk youth – to create momentum on a shared day of giving and leverage their collective outreach efforts.

Now in its 10th year, iheartOC Giving Days have garnered an astounding \$35 million in charitable contributions to fuel the missions of local nonprofits. Our neighbors have clearly answered the call to give where their hearts live.

To learn more about iheartoc Giving Days visit iheartoc.org.



The Village at 17th Street

15TH ANNIVERSARY: It Takes a Village

In June, we celebrated 15 years of impact at The Village at 17th Street, Orange County's first dedicated office building for local nonprofits. Since opening in 2010 in Santa Ana, The Village has been a home for 42 local nonprofits, offering a dynamic environment that supports, connects and enhances mission-driven organizations working to uplift and strengthen our community.

The Village at 17th Street has become a successful model of a thriving and collaborative nonprofit hub, thanks to the vision and dedication of co-founders William Podlich, retired PIMCO CEO and Warren Lortie, retired CEO of WLA Investments.

The Village supports a diverse collection of nonprofits focusing on areas such as health, homelessness, entrepreneurship, child development, and more. This supportive environment has helped organizations maximize resources, share knowledge, build relationships, and collaborate with each other, to better serve the people of Orange County.

To learn more about The Village at 17th please visit ocsharedspaces.org.



“

There is no power for change greater than a community discovering what it cares about.

- MARGARET J. WHEATLEY



INTRODUCING Vision 2030

THE POWER OF **COMMUNITY**



"I am delighted to lead the strategic planning efforts for Vision 2030. In partnership with our donors and community partners we are committed to building a robust foundation for the future, where charitable giving is amplified to build momentum for good. By also focusing on operational excellence, we can better position OCCF to serve the communities we know and love for years to come."

- Tammy Tumbling, President

Turning today's generosity into tomorrow's impact requires more than just good intentions. It demands a bold vision, informed strategies, and philanthropic know-how. It calls for the perfect blend of head and heart. That's why we're launching Vision 2030— our five-year strategic plan to amplify giving, support our donors' philanthropic goals, and nurture thriving communities in Orange County and beyond.

AMPLIFIED GIVING

We inspire local donors to give more and with greater impact to grow the good in Orange County and beyond.

DONOR ENGAGEMENT

As a trusted strategic advisor, we help our donors support the causes closest to their hearts.

COMMUNITY IMPACT

We are experts at recognizing promise, convening key players, and applying our unique capabilities to create momentum for good, together.

OPERATIONAL EXCELLENCE

The foundation of our work is bringing operational excellence to our role as a steward of local philanthropy.



A Shared Commitment to Orange County's Thriving Future.

Orange County is rich with heartfelt intentions: generous donors eager to make a difference and passionate partners working toward a brighter future. Our community's desire to create lasting change is truly inspiring. As we partner with donors to achieve charitable impact near and far, Orange County will always be the home of OCCF's heart. Supporting the local communities we hold dear is a key pillar of our Vision 2030 plan.

Community Impact Initiatives

A promising future for Orange County depends on knowing what our unique communities need and delivering solutions to the real challenges they face. Over the next five years, OCCF is committing to **six core community impact initiatives** that reflect our shared commitment to Orange County's thriving future.



ECONOMIC OPPORTUNITY

Creating pathways to good jobs, living wages, and shared prosperity across Orange County.



ENVIRONMENTAL STEWARDSHIP

Preserving our coastlines, open spaces, and natural resources so future generations inherit a healthy home.



EDUCATIONAL ACCESS

Opening doors so every student – no matter their background – has the chance to learn, grow, and succeed.



COMMUNITY POWER BUILDING

Strengthening voices too often left unheard, ensuring every community has a seat at the table.



WOMEN'S HEALTH

Supporting and strengthening women's health and well-being at every stage of life.



YOUTH MENTAL HEALTH

Surrounding children and youth with the support and resources they need to live healthy, hopeful lives.

Join Us in Making a Difference

Learn With Us:

Join us on this journey as we build partnerships and create momentum for good.

Share With Us:

Lend your expertise or collaborate with us to discover solutions.

Give With Us:

Contribute to achieving collective impact as our partner in this vital work.

OCCF TEAM


EXECUTIVE LEADERSHIP




Shelley Hoss
Chief Executive Officer




Tammy Tumbling
President



Brian Schaeffen
Chief Financial Officer




Cathleen Otero
Chief Operating Officer




Sharon Johnson
Chief Human Resources Officer


LEADERSHIP TEAM




Greg Cravens
Finance & Administration




Margita Labhard
Philanthropic Strategy




Joanne Gonzalez Forster
Philanthropic Strategy



Carol Ferguson
Donor & Community Engagement



Keri Mesina
Donor & Community Engagement



Monica Seely
Marketing & Communications

EXECUTIVE OFFICE



Janiece Dunning-Francis



Rachel Lowenthal

DONOR & COMMUNITY ENGAGEMENT



Claire Alkire



Joe Cordell



Michaela Dolium



Rachel Donawerth



Pia Flores



Priscilla Aguilar

HUMAN RESOURCES

MARKETING & COMMUNICATIONS



Angie Arias



Anastasia Rowland

FINANCE



Dan Ball



Thomas Moore



Matthew Nguyen



Nicole Perry



Suzanne Preston

Learn more
about our staff at
oc-cf.org/staff

BUSINESS OPERATIONS



Edith Guefroudje



Luis Wences

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

Board Officers



CHAIR

John M. Williams
Gibson, Dunn & Crutcher LLP



VICE CHAIR & SECRETARY

Kate Duchene
RGP



FINANCE CHAIR

Bob Whalen
Stradling Yocca Carlson & Rauth

To learn more, please visit [.oc-cf.org/about-us/board-of-governors](https://oc-cf.org/about-us/board-of-governors)



Anna Escobedo Cabral
Cabral Group



Rachid Chamtieh
Deloitte & Touche LLP



Joanna Kong
Sun Family Foundation



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



Kristen Monson
Pacific Investment Management
Company (Ret.)



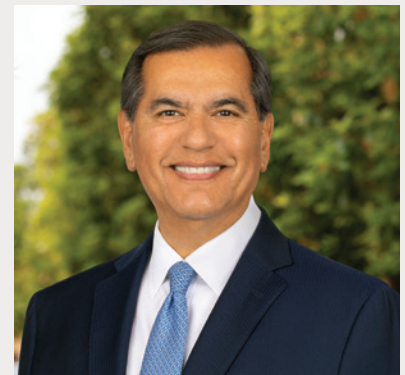
Tam T. Nguyen
Advance Beauty College



Arnold Pinkston
Edwards LifeSciences (Ret.)



Christopher D. Tower, CPA
BDO USA (Ret.)



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



Fram Virjee
Emeritus President, Cal State Fullerton



Paul C. Westhead
Rimrock Capital Management, LLC





Save *the* Date

Please mark your calendars for
our 2026 Annual Meeting!

November 19, 2026
Hyatt Regency Irvine



Orange County Community Foundation

CFNS

ACCREDITED
FOUNDATION

    @OCCommunityFdn

19200 Von Karman Ave., Suite 700, Irvine, CA 92612
949.553.4202 | oc-cf.org | ocnonprofitcentral.org

© Orange County Community Foundation