2026 ANNUAL REPORT

BUILDING BRIDGES

Momentum for Good

Orange County Community Foundation

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

- MARGARET J. WHEATLEY

Connection. Community. Humanity.



In reflecting on the past year, we are filled with both awe and gratitude. It has been a momentous year for philanthropy at the Orange County Community Foundation! We supported record-breaking granting from our generous donors who have made an impact on the causes closest to their hearts in Orange County, across the country and around the world, and made significant strides toward our Vision 2030 community initiatives.

We have witnessed the power of collaboration first-hand, and the impact that becomes possible when we unite around a shared commitment to a future where all have the opportunity to thrive.

This progress would not have been possible without the steadfast support and vision of the Orange County community. Together, we have laid a foundation that will continue to strengthen our region for generations to come. Thank you for being an essential part of this journey. We can't wait
to see what the future holds!

With appreciation,

John M. Williams
Board Chair

Shelley M. Hoss
Chief Executive Officer

2026 by the Numbers

(For the year ended 6.30.26)

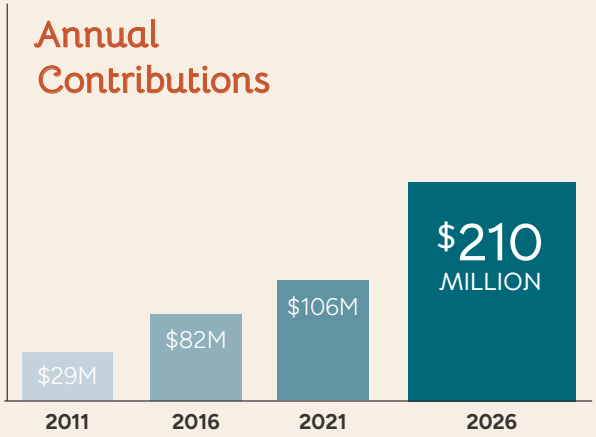
Together with our donors and partners, we have granted $1.4 billion to create opportunity, strengthen communities and build a more vibrant future since our inception in 1989.

$1.4 Billion
in Cumulative Granting

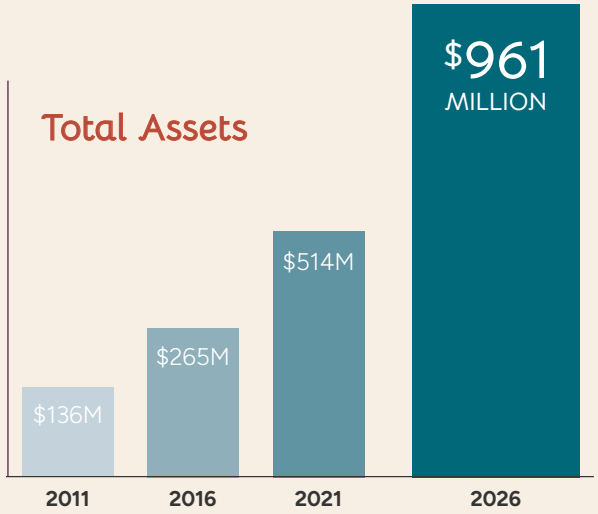


Inspired Teacher Grant Program Reception

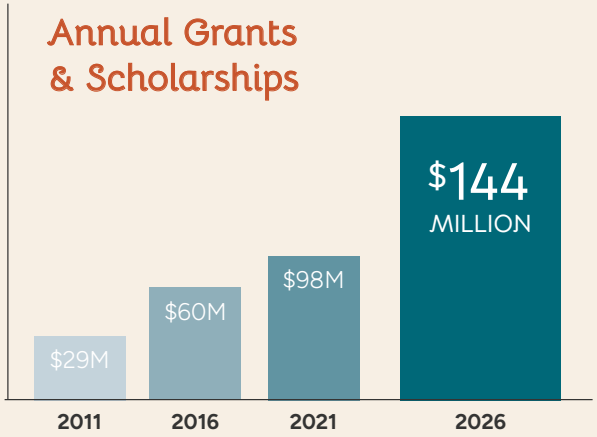
Annual Contributions



Total Assets



Annual Grants & Scholarships



HOME TO MORE THAN

700 Charitable Funds

benefiting a wide range of causes, including human services, education, health and wellness, environment, the arts, and community development.



HEEF Scholarship Recipient Luncheon



CASA Back to School Picnic



OCCF Staff with Glennwood House Residents

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

FINANCE COMMITTEE

Bob Whalen, Chair
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Reshma Block
Principal, 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

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Cabral Group

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Armanino LLP (Ret.)

Rachid Chamtieh
Deloitte & Touche LLP

Paul Heeschen
Heeschen & Associates

Timothy Kay
Snell & Wilmer

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

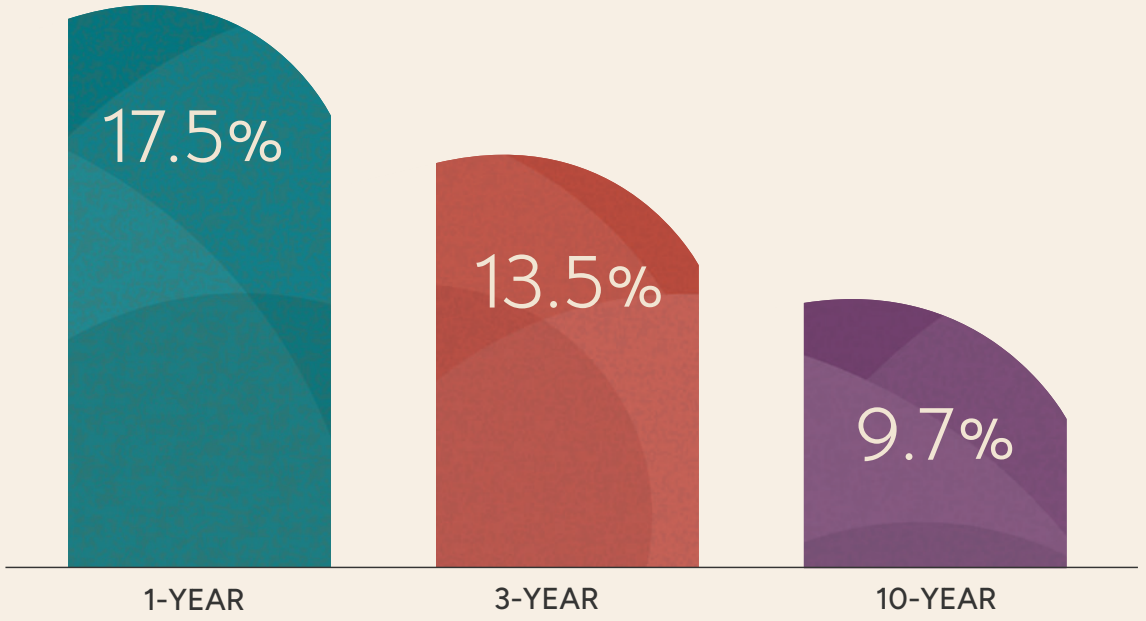
Bob Whalen
Stradling Yocca Carlson & Rauth

John M. Williams
Gibson Dunn & Crutcher LLP

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 (6.30.2026)

$480 MILLION

CUMULATIVE INVESTMENT EARNINGS SINCE INCEPTION



Inspired Teacher Grant Program Reception

INVESTMENT COMMITTEE

Paul C. Westhead, Chair
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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.

The Mussallems Grow the Good

Where This Work Began - The George And Bob Fund

Linda's brother Bob was born in 1942 in Ottawa, Illinois. Mike's brother George was born in 1950 in Gary, Indiana. Both had Down syndrome, and both had mothers who refused the era's advice to institutionalize their sons.

When Linda and Mike met after college, they found they shared a similar story. The George and Bob Fund was established to direct the Mussallem's giving to organizations that enhance the lives of people with Down syndrome as well as research initiatives for medical breakthroughs to support the Down syndrome population. Linda and Mike Mussallem have spent a lifetime turning personal experience into progress for overlooked populations in need. Their newest effort to transform the lives of people with congenital heart defects carries a vision sparked in Orange County onto the national stage.



Many babies born with heart defects now survive childhood. MCA's work begins with what comes next.

"OUR BROTHERS FILLED EACH OF OUR HOMES WITH LOVE AND JOY AND MADE EACH OF US BETTER PEOPLE."

- LINDA MUSSALLEM

A Heart for What Comes Next

Approximately one in every 100 babies is born with a heart defect, making it the most common birth defect in the world. Decades of surgical progress mean most of those babies now survive to adulthood, but each person with a congenital heart defect (CHD) faces a lifetime of care with which research and technology have yet to catch up.

Mike Mussallem has dedicated his career to healthcare innovation. During his two decades leading Edwards Lifesciences in Irvine, he championed heart innovations that transformed outcomes for adult patients, but he also noticed how little of that momentum reached the people born with the most complex hearts.

The Mussallem CHD Alliance was created to reach these hearts. As the flagship initiative of the Linda and Mike Mussallem Foundation, which focuses on advancing meaningful and life-changing solutions for healthier and happier living, the Alliance champions solutions for people born with heart defects so they can survive and thrive. Its ambition encompasses the entire ecosystem of care, research, and policy that a person with CHD moves through across a lifetime.



MCA President Orin Herskowitz and other CHD foundation leaders bring the case for congenital heart research funding to Washington, D.C.



The Mussallem CHD Alliance team and founders.

Under MCA President Orin Herskowitz, the Alliance convenes clinicians, researchers, funders, policymakers, and patient advocates who have long worked in parallel, but historically have lacked the coordination the Alliance believes is required to ignite meaningful, systems-level change. While a single foundation can fund a study, a coordinated field can transform the standard of care and the national policy frameworks that must support it

During its first year, the Alliance is focusing on three major initiatives: streamlining the path for CHD innovations to reach patients, developing a U.S. public affairs strategy and developing a plan for better leveraging CHD patient data and real-world evidence to benefit people with CHD.

For Linda and Mike, there has never been a better moment to take on the challenge of transforming care for people with CHD. The pace of medical and technological advancements breaking through every day is inspiring, and by bringing together the right players to focus their skills and efforts on CHD, the Mussallems believe meaningful change is well within reach for people with CHD across the world.



Linda and Mike Mussallem, whose Orange County–based foundation launched the Mussallem CHD Alliance in 2026.

"OUR VISION IS TO BUILD A FUTURE WHERE EVERY PERSON BORN WITH A HEART DEFECT NOT ONLY SURVIVES, BUT TRULY THRIVES."

- MIKE MUSSALLEM

Vision 2030

A Year of Progress

We are proud to share the progress achieved during the first year of our Vision 2030 strategic plan. This five-year initiative focuses on amplifying impact and supporting the local communities we hold dear. At its core are six community impact initiatives, each addressing a critical area of need or opportunity where OCCF can help drive meaningful progress. The first year of Vision 2030 has been one of collaboration, connection and capacity building. As we move forward, OCCF remains dedicated to working alongside our donors and partners with a shared commitment to Orange County's thriving future.



Fullerton College Drone Program

ECONOMIC OPPORTUNITY

Creating pathways to shared prosperity is our primary focus. We have developed an economic mobility heatmap to identify priority communities and address workforce challenges, and are exploring healthcare workforce pathways and childcare as integral parts of economic infrastructure. These initiatives aim to ensure that all members of our community have access to rewarding jobs and living wages.



OCCF Donors Dennis Keith & Karen Carlson



EDUCATIONAL ACCESS

Education is a powerful tool for change, and ensuring access for all students is a priority. This year, we completed convenings and stakeholder engagements to identify persistent gaps in educational completion and career alignment. Our efforts culminated in a grantee convening and a donor and partner educational event. We are particularly focused on communities in Anaheim, Garden Grove, and Westminster to open more doors for students in need.

WOMEN'S HEALTH

Supporting women's health and well-being at every life stage is a cornerstone of our commitment to Orange County. Over the past year, we've identified three life stages as our key focus areas: perinatal, midlife, and aging. Earlier this year we released a Request for Proposals (RFP) to invite organizations to develop solutions in these areas. Our call was met with enthusiasm, as evidenced by 40 proposals from 37 organizations.



Ranney Draper with AVID Scholar

COMMUNITY POWER BUILDING

Ensuring that every community voice is heard and valued is vital to our vision. Over the past year, we have made strides through capacity-building grants and civic engagement initiatives. Noteworthy accomplishments include an immigration summit and initiatives aimed at combating hate incidents. These efforts lay the groundwork for sustained civic infrastructure and measurable outcomes, empowering communities to have a say in their future.

Protect & Preserve: A Look Inside the Randall Preserve

YOUTH MENTAL HEALTH

Our commitment to youth mental health focuses on providing the support and resources necessary for children and youth to lead healthy, hopeful lives. A systems-level collaborative approach has resulted in key local partnerships. In May, we launched the Advisory Collaborative, followed by a convening in June. We are currently developing a strategy and funding framework, engaging stakeholders from education, healthcare, and county partnerships to tackle this critical issue collectively.

ENVIRONMENTAL STEWARDSHIP

Preserving Orange County's natural beauty and resources is essential for future generations. This year, we commenced research for a 10-year impact roadmap which will culminate in a comprehensive progress report. In September, we hosted an educational event featuring a special tour of the Randall Preserve, highlighting our commitment to environmental education and stewardship.

To learn more about Vision 2030, visit oc-cf.org/Vision2030

The Power of Community: A Transformative Documentary Series

This year, we partnered with OC World to produce "The Power of Community," an inspiring 6-part documentary series that explores the challenges faced by Orange County residents and the innovative solutions driven by local philanthropy.

Each episode combines expert insights, personal narratives, and evidence-based solutions to provide a comprehensive look at how collective efforts can lead to meaningful change. By showcasing these narratives, we strive to inspire unity and purpose within our communities.



The series underscores the transformative strength of community-driven initiatives and the significant impact of our shared endeavors. Through storytelling, we illuminate the enduring spirit of our philanthropic community and our collective dedication to creating a brighter, more inclusive future for all who call Orange County home.

To learn more and watch the series, visit oc-cf.org/power-of-community



EPISODE 1: "Child and Youth Mental Health: A Hidden Epidemic"

YOUTH MENTAL HEALTH: This episode examines startling local data and highlights real-world solutions in action. It presents heartfelt stories of resilience and healing from local youth and families tackling mental health issues, underscoring the importance of local nonprofit resources in providing critical support.



EPISODE 2: "Earn & Learn: Tomorrow's Innovation Economy"

ECONOMIC OPPORTUNITY: We explore the intersection of education and economic innovation, spotlighting programs that equip our youth and young adults with the skills needed for tomorrow's workforce.



EPISODE 3: "Promising Futures: The Path to College and Beyond"

EDUCATIONAL ACCESS: This episode focuses on opening pathways and bridging gaps to higher-education success in underserved communities, especially among first-generation college students.



EPISODE 4: "Protect & Preserve: Orange County's Unique Ecosystems"

ENVIRONMENTAL STEWARDSHIP: This episode explores the region's natural landscape, the critical environmental challenges and community-led solutions shaping the health of Orange County's land and water.



EPISODE 5: "Women's Health Drives Community Health"

WOMEN'S HEALTH: This episode sheds light on the unique health issues faced by women and the programs in Orange County working to reduce barriers that prevent women from seeking essential care, which impacts not only their own health, but their families and communities as well.



EPISODE 6: "Building Bridges: Connection. Community. Humanity."

COMMUNITY POWER BUILDING: We explore efforts to foster belonging and connection across Orange County's diverse communities, highlighting initiatives working to bridge divides and resolve conflicts through re-entry, restorative justice and "long-bridging" programs to deepen understanding and strengthen community bonds.

Beyond the Grant

At the Orange County Community Foundation we are committed to fostering **collaboration, connection, and capacity-building** to strengthen local nonprofits and the communities they serve.



Orange County Black Solidarity Network

OCBSN is a coalition of local organizations dedicated to addressing hate against Black communities in Orange County. OCBSN was made possible through the second round of California's Stop the Hate program funding in 2020. Their mission is to enhance the lives and well-being of African Americans within the Orange County region by fostering inclusivity, equity and the eradication of all forms of hatred within our communities.

To learn more visit ocblacksolidaritynetwork.org.



OC Nonprofit Central

OC Nonprofit Central makes giving easy. Powered by OCCF, this fully searchable online database provides detailed insights into the diverse array of nonprofit organizations serving Orange County. It was created with the vision of empowering local donors and funders with the information they need to make informed decisions about their charitable contributions.

To learn more visit ocnonprofitcentral.org.

Charitable Ventures

Charitable Ventures was formed thanks to a strategic partnership with OCCF nearly 20 years ago. Since then, this leading nonprofit has grown to manage a diverse portfolio of projects, community programs, and funds, greatly contributing to regional philanthropy and nonprofit capacity building. From fiscal sponsorship and public contract services to social impact consulting and nonprofit operations support, their work is rooted in advancing equity and long-term community resilience.

To learn more visit CVforGood.org.



OCCF TEAM

EXECUTIVE LEADERSHIP



Shelley Hoss
Chief Executive Officer



Tammy Tumbling
President



Brian Schaefgen
Chief Financial Officer



Cathleen Otero
Chief Operating Officer



Sharon Johnson
Chief Human Resources Officer

SENIOR LEADERSHIP



Greg Cravens
Finance & Administration



Keri Mesina
Donor & Community Engagement



Leslie Prado
Donor & Community Engagement



Monica Seely
Marketing & Communications



DONOR & COMMUNITY ENGAGEMENT


Claire Alkire


Savannah Benton


Raveena Dhaliwal


Michaela Dolium


Rachel Donawerth


Pia Flores


Katie Nguyen

EXECUTIVE OFFICE


Janiece Dunning-Francis


Rachel Lowenthal

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Priscilla Aguilar

PHILANTHROPIC STRATEGY


Amanda Svolos

FINANCE


Dan Ball


Olga Kayumba


Matthew Nguyen


Thomas Moore


Nicole Perry


Suzanne Preston

MARKETING & COMMUNICATIONS


Angie Arias


Anastasia Rowland

BUSINESS OPERATIONS


Edith Guefroudje


Luis Wences


Sheri Winterowd

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

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John M. Williams
Gibson, Dunn & Crutcher LLP



VICE CHAIR & SECRETARY
Kate Duchene
RGP (Ret.)



FINANCE CHAIR
Bob Whalen
Stradling Yocca Carlson & Rauth

To learn more, please visit oc-cf.org/about-us/board-of-governors



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Cabral Group



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Pacific Investment Management Company (Ret.)



Tam T. Nguyen
Advance Beauty College



Arnold Pinkston
Edwards LifeSciences (Ret.)



L. Song Richardson
UCI School of Law



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

Orange County Community Foundation

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ACCREDITED FOUNDATION

@OCCommunityFdn

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