

Orange County Family Foundation Alliance

powered by the *Orange County Community Foundation* 

Local family foundations committed to learning and sharing together to maximize their philanthropic impact.

More than 12 years ago, the Family Foundation Alliance was formed by several local foundations in partnership with the Orange County Community Foundation to provide a platform that encourages connections, relationships, and learning among local family foundations.

Through quarterly meetings, educational opportunities, and peer networking, the Alliance tailors activities based on input from members, ensuring relevant and valuable resources for all participants.

ELIGIBILITY & BENEFITS

ELIGIBILITY

Membership is available by invitation only to family members, board members, and full-time executive directors of local family foundations, as well as advisors of OCCF Signature Funds.

BENEFITS

- **Exclusive Networking Opportunities:** Connect with a diverse group of philanthropic leaders, sharing insights and best practices.
- **Confidential and Safe Learning Environment:** Engage in discussions and learning in a confidential setting, ensuring a comfortable space for open dialogue.
- **Quarterly Member Events:** Participate in carefully curated events focused on education, networking, and collaborative opportunities.
- **Next Generation Philanthropy:** Encourage and involve the younger generation in philanthropy, preparing them as future leaders.
- **Peer Networking Groups:** Join specialized groups for deeper engagement and focused discussions on topics relevant to group members.

FEES & SPONSORSHIP

- **Annual Membership: \$500**
- **First year offer for new members: \$250**
- **Sponsorship opportunities range from \$500 - \$4,500**

Membership fees and sponsorships underwrite program costs such as materials, venue costs and speaker fees. OCCF underwrites all staffing costs for the Alliance. This helps to enrich the quality and impact of our offerings.

A single membership entitles qualifying foundation representatives to participate in member events. Membership fees are considered charitable distributions from your foundation to OCCF, a public charity.

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2024 Calendar of Events*

**Dates and times may be subject to change.*

MARCH

- **Wednesday, March 27th**
12:00 p.m. - 2:00 p.m.
Andrei's Conscious Cuisine, Irvine

JUNE

- **Wednesday, June 12th**
12:00 p.m. - 2:00 p.m.
Andrei's Conscious Cuisine, Irvine

SEPTEMBER

- **Wednesday, September 18th**
12:00 p.m. - 2:00 p.m.
Andrei's Conscious Cuisine, Irvine

DECEMBER

- **Wednesday, December 4th**
12:00 p.m. - 2:00 p.m.
The Pacific Club, Newport Beach

By joining the Family Foundation Alliance, you will be part of a collaborative group that values the power of shared knowledge and collective action.

To learn more, please contact **Keri Mesina** at kmesina@oc-cf.org or **949.464.4160**.

Thank You to our 2023 Sponsors

CorMura Foundation
Crevier Family Foundation
The Lionel and Debra D'Luna Foundation
Draper Family Fund
Dubchansky Family Foundation
Fainbarg Family Foundation
The Donna and Spencer Gilbert Foundation
Golden Eagle Foundation
The Gordon Foundation
O.L. Halsell Foundation
Harris Taylor Family Foundation
George Hoag Family Foundation
Warren H. Lortie Fund
The Sharon D. Lund Foundation
The Murphy Family Foundation
OneRoot Foundation
The Wilson W. Phelps Foundation
The Roberto Foundation
Schoellerman Foundation
Sun Family Foundation
Sutton Family Fund
Keith and Judy Swayne Family Foundation Fund
Tarsadia Foundation
The Thompson Family Foundation
Ueberroth Family Foundation

Membership Sign Up Form

Yes! My foundation would like to become a member of the Family Foundation Alliance.

ROLE: Board Member Family Member Full-time Executive Director OCCF Fund Advisor

FOUNDATION NAME _____

MEMBER(S) CONTACT NAME(S) _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE _____ EMAIL _____

ADDITIONAL CONTACT NAME (OPTIONAL) _____ ROLE _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE _____ EMAIL _____

2024 MEMBERSHIP FEE

- \$500 Annual Membership
- \$250 First-year Discounted Annual Membership (exclusive offer)

SPONSORSHIP OPTIONS

- \$500
- \$1,000
- \$2,500
- \$4,500

Membership fees and sponsorships are considered charitable distributions from your foundation to OCCF, a public charity. They help to underwrite program costs such as materials, venue costs and speaker fees. OCCF underwrites all staffing costs for the Alliance. All sponsors will be recognized in promotional materials and on the Alliance website.

Please return completed form via email to kmesina@oc-cf.org or U.S. mail to:

Orange County Community Foundation; Attn: Keri Mesina; 19200 Von Karman Ave., Suite 700, Irvine, CA 92612

For any questions or additional information, please contact **Keri Mesina** at **949.464.4160**.

Membership Renewal

Renewing your exclusive Family Foundation Alliance membership gives you the opportunity to further connect with Alliance members and remain informed on best practices and community needs through member events and educational resources. Membership also allows qualifying members* of your foundation to participate in the Alliance through quarterly member events, access to a network of foundations, and group site visits.

**Members include family members, board members and full-time executive directors of member foundations as well as advisors of qualifying OCCF Signature Funds.*

MEMBERSHIP & SPONSORSHIP

Membership fees and sponsorships are considered charitable distributions from your foundation to OCCF, a public charity. They help to underwrite program costs such as materials, venue costs and speaker fees, thereby enriching the quality and impact of our offerings. OCCF underwrites all staffing costs for the Alliance. All sponsors will be recognized in promotional materials and on the Alliance website.

Yes! I would like to renew my Family Foundation Alliance membership.

- \$500 (Membership Only)
- \$1,000 (Membership plus \$500 Sponsorship)
- \$1,500 (Membership plus \$1,000 Sponsorship)
- \$3,000 (Membership plus \$2,500 Sponsorship)
- \$5,000 (Membership plus \$4,500 Sponsorship)

MEMBER(S) CONTACT NAME(S)

PHONE

EMAIL

FOUNDATION NAME

FOUNDATION RECOGNITION NAME FOR PROMOTIONAL MATERIALS

Payment Options

- Check:** Please make payable to Orange County Community Foundation and indicate "FFA" in the memo line. Mail checks to: 19200 Von Karman Ave., Suite 700, Irvine, CA 92612
- Credit Card:** Visit oc-cf.org/donate to make a credit card payment. Select "Family Foundation Alliance" from the drop-down menu. Please note "membership contribution" in the comments section.
- Donor Advised Fund:** You can contribute through a donor-advised fund, if applicable.

Please return completed form via email to kmesina@oc-cf.org or U.S. mail to:

Orange County Community Foundation; Attn: Keri Mesina; 19200 Von Karman Ave., Suite 700, Irvine, CA 92612

For any questions or additional information, please contact **Keri Mesina** at **949-464-4160**.