



CELEBRATING

Impact

35 YEARS
OF GROWING THE GOOD

 Orange County
Community Foundation



Think Together



Girls Inc.



Segerstrom Center



Braille
Institute



You cannot get through a single day without having an impact on the world around you. What you do makes a difference, and you have to decide what kind of difference you want to make.

- JANE GOODALL

CELEBRATING

35 *years*

OF IMPACT

OUR MISSION

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



A Celebration 35 Years in the Making

As the Orange County Community Foundation (OCCF) marks our anniversary this year, we celebrate 35 years of unwavering commitment, dynamic leadership, and transformative impact for good. Since our founding in September 1989, OCCF's journey has been powered by passion, vision, innovation, and above all, a deep and lasting dedication to the Orange County community.

Over three and a half decades, OCCF has been a powerful catalyst for individual, family and corporate philanthropy, transforming the collective goodwill of our community into meaningful, lasting change. Despite our relative youth in the community foundation field, we have distinguished ourselves among our peers, ranking as the 7th most active grantmaker among 800 U.S. community foundations.

As we reflect on the highlights of our 35 years, none stands out more than the extraordinary impact we have made with the donors who have chosen us as their philanthropic partner. With over \$1.1 billion in cumulative granting, we have touched countless lives and helped shape a brighter future in Orange County and beyond.

In the pages that follow, you'll find highlights and achievements from 2024, financial results over our 35 years, insights into emerging initiatives, and significant moments in our journey. We hope these stories inspire you as much as they have inspired us.

The centerpiece of our anniversary celebration is the collective spirit of generosity that defines the Orange County community. It is our greatest joy and honor to serve as Orange County's community foundation, and we look forward to continuing this journey with you for the next 35 years, and beyond.

With gratitude and anticipation,



Rachid Chamtieh

Rachid Chamtieh
Board Chair



Shelley M. Hoss

Shelley M. Hoss
Chief Executive Officer

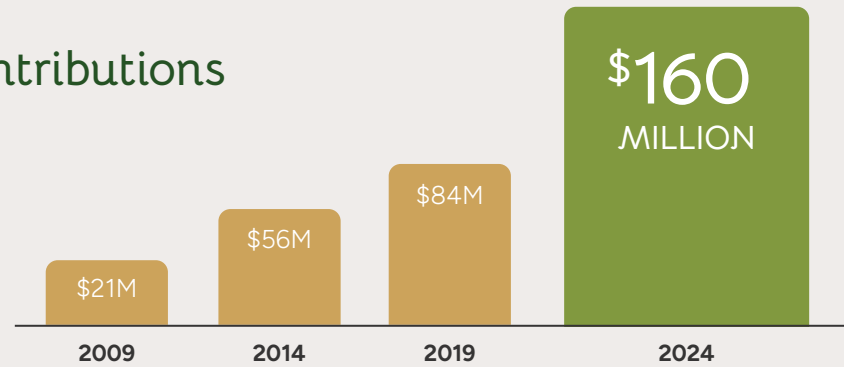
FINANCIALS

2024 by the Numbers

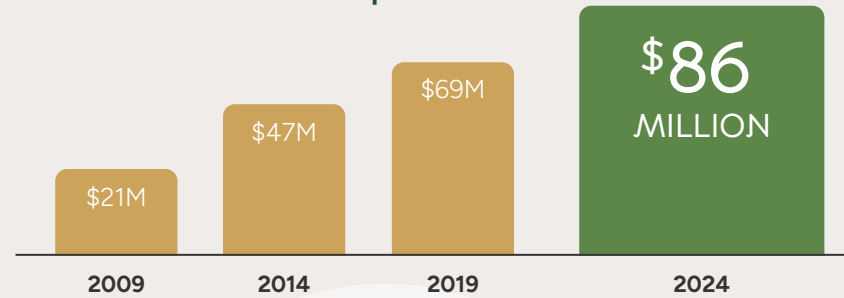
(For the year ended 6.30.24)



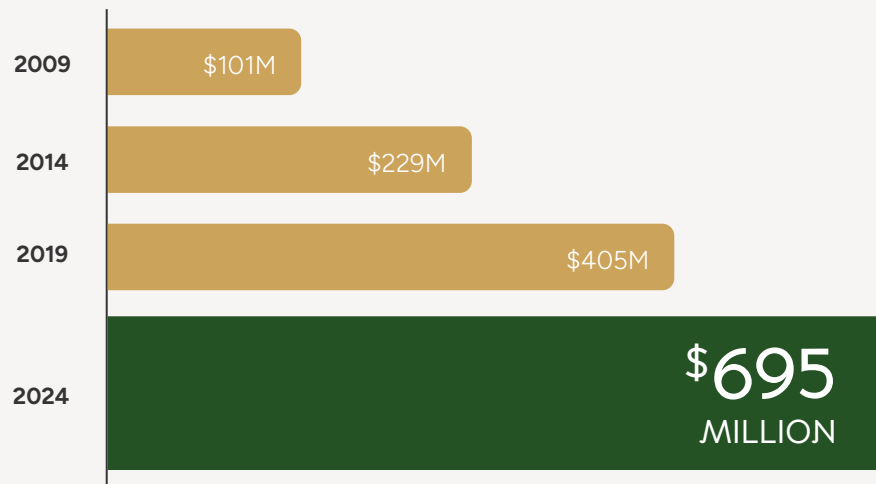
Contributions



Grants & Scholarships



Assets



Among more than 800 U.S. community foundations

7TH MOST ACTIVE GRANTMAKER & **TOP 7%** IN ASSETS



HOME TO
MORE THAN
650
CHARITABLE
FUNDS

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

FINANCE COMMITTEE

Kate Duchene, Chair
RGP

Reshma Block
Tricon Residential

Dan Bolar
Armanino LLP (Ret.)

Anna Escobedo Cabral
Cabral Group

Rachid Chamtieh
Deloitte & Touche LLP

Greg Palmer
Supplemental Health Care

Paul Westhead
Rimrock Capital Management LLC

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Stradling Yocca Carlson & Rauth

Sally Anderson
Ernst & Young (Ret.)

Dan Bolar
Armanino LLP (Ret.)

Rachid Chamtieh
Deloitte & Touche LLP

Paul Heeschen
Heeschen & Associates

Timothy Kay
Snell & Wilmer

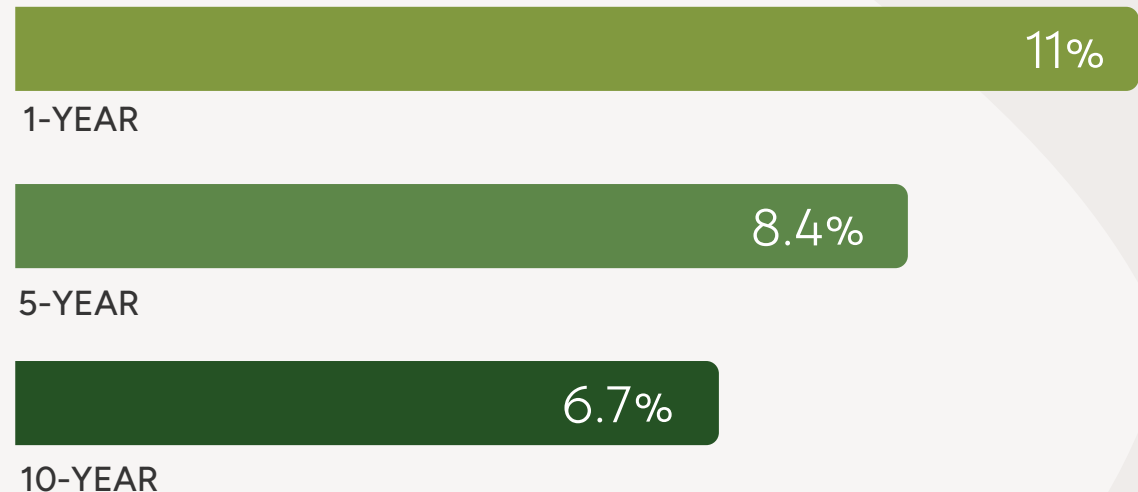
INVESTMENTS

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.

ANNUALIZED RETURNS (6.30.24)





35 Years of Growing the Good

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.

Over 35 years, a staggering \$300 million has been added to the assets under our stewardship through investment returns. That's what we call growing the good!

\$300 Million
IN CUMULATIVE INVESTMENT EARNINGS

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

Robert Dudley, Heeschen & Associates

Richard Gadbois, Argyle Street Management

Jason Howard, New Catalyst Strategic Partners

Kayhan Mirza, Goldman Sachs (Ret.)

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

Greg Palmer, Supplemental Health Care

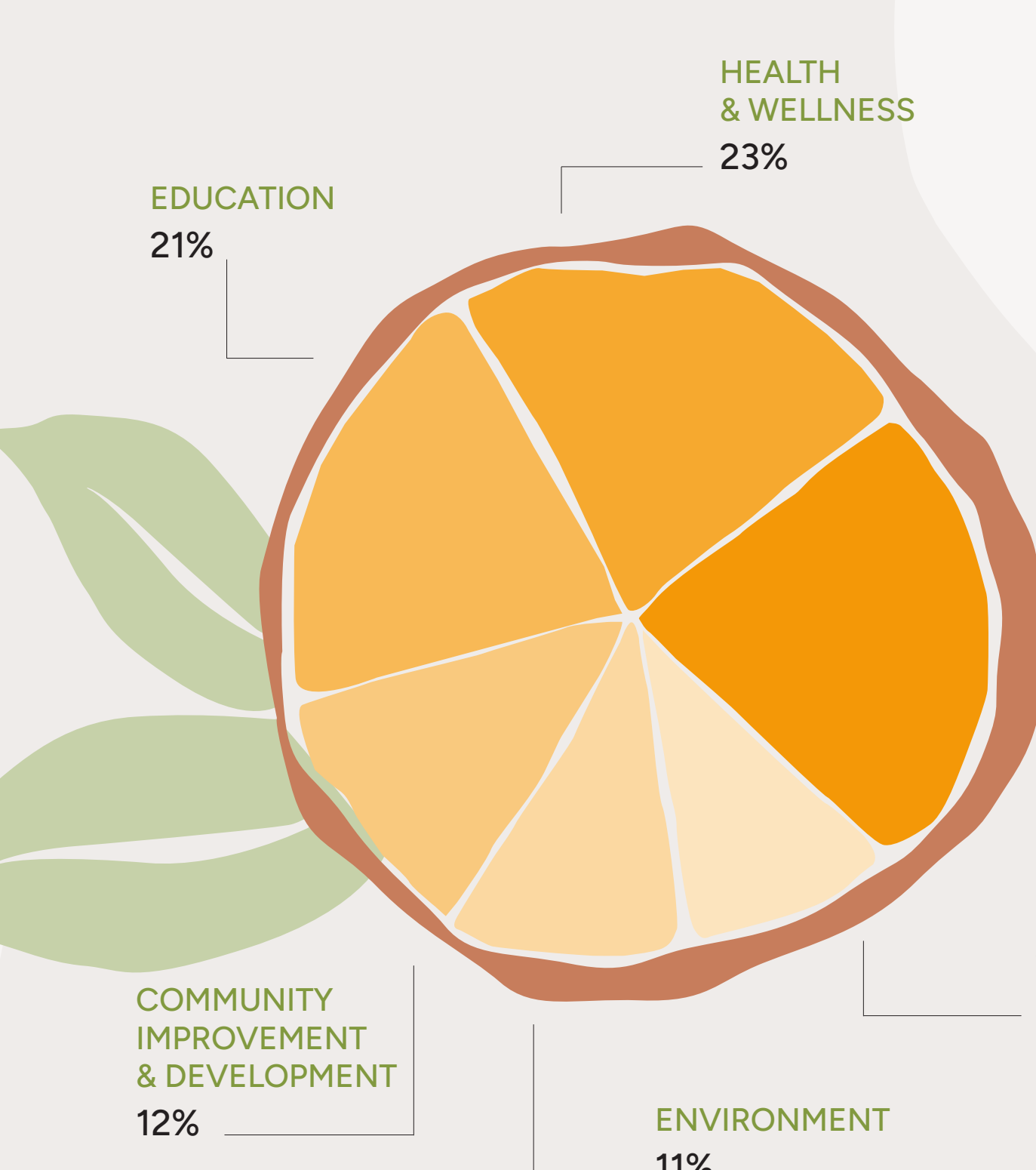
GRANTMAKING

A Bold Goal Achieved!

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. Not only did we reach our goal, but **we did it more than a year early and have already exceeded it by another \$100 million!**

\$1.1 Billion
IN CUMULATIVE
GRANTING





With OCCF, donors give where their hearts live.

Over the past 35 years our donors have made an impact on the causes closest to their hearts in Orange County, across the country and around the world. Whether in education, healthcare, environmental conservation or human services, each gift represents a heartfelt commitment to making a lasting impact for good.

HUMAN SERVICES
23%

OTHER
10% This includes animal welfare, arts & culture, and more. Help us grow the good in these areas!

COMMUNITY IMPROVEMENT & DEVELOPMENT
12%

ENVIRONMENT
11%

OCCF INITIATIVES

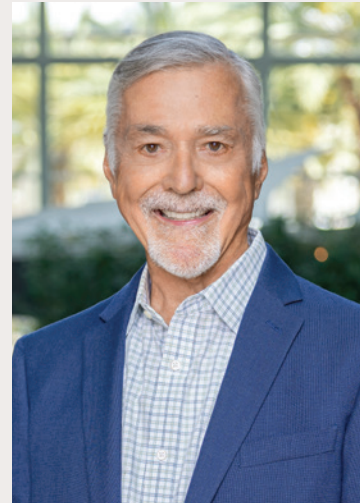
Promising Futures OC

Philanthropist Ranney Draper founded the Promising Futures Fund as a permanent endowment at the Orange County Community Foundation driven by the belief that an educated citizenry is essential to our democracy. The Fund's vision is an Orange County where all students can achieve their full potential through college or career readiness and aims to reach a \$10 million endowment goal to ensure sustainable grantmaking. An initial round of grants totaling \$385,000 was awarded to 16 local nonprofits working to advance educational equity, strengthen family and community support for education, and fuel economic opportunity.

To learn more about the Promising Futures Fund and how to get involved, visit oc-cf.org/promising-futures.



Powered by the **Orange County Community Foundation**



Avanzar Board Leadership Academy

Powered by the Orange County Community Foundation

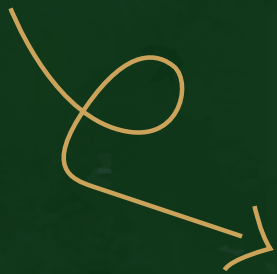


Avanzar Board Leadership Academy

The Avanzar Board Leadership Academy was created in response to the high demand among local nonprofits wanting to ensure their boards reflect the Orange County communities they serve. Launched in 2023 in collaboration with Adelante Partners, 41 participants have completed the three-month training program fully underwritten by OCCF, equipping themselves with the necessary skills to become confident board members and leaders for Orange County nonprofits. Upon graduation, participants have access to an extended network of peers and nonprofit organizations with opportunities for continued engagement, such as professional development and networking events.

To learn more about the Avanzar Board Leadership Academy and how to get involved, visit oc-cf.org/avanzar.

35 years of growing
the good in Orange
County and beyond



ERAS OF IMPACT

Momentum FOR GOOD



1989 – 1999

Sparking *Inspiration*

The Orange County Community Foundation was launched by Judy Swayne with a bold goal to bring the unique capabilities of a community foundation to create a thriving culture of philanthropy and a stronger, more vibrant community for all who call Orange County home.

Partnerships and Initiatives:

Oser Foundation, Hispanic Education Endowment Fund (HEEF), Endow Orange County, Centennial Scholarship Fund and Disney VoluntEARS.

10 YEARS: \$13M CUMULATIVE GRANTING
\$39M TOTAL ASSETS | 129 FUNDS



1999 – 2009

Setting *Intention*

In our second decade, OCCF solidified its role as the center of gravity for philanthropy in Orange County. This transformative era began with a leadership transition from founder Judy Swayne to Shelley Hoss, and saw dramatic growth in OCCF's reach and community impact.

Partnerships and Initiatives:

Helping Kids Achieve, Orange County Marine Memorial Fund, OC Arts Initiative, ReachOut OC, and Next Generation Philanthropy Group.

20 YEARS: \$144M CUMULATIVE GRANTING
\$101M TOTAL ASSETS | 405 FUNDS



2009 – 2019

Achieving *Impact*

During our third decade, OCCF experienced significant growth and increased its impact in Orange County, across the nation, and around the world.

Partnerships and Initiatives:

The Village at 17th, Family Foundation Alliance, ConnectOC, OC Nonprofit Central, OC Veterans Initiative, and iheartoc Giving Days.

30 YEARS: \$630M CUMULATIVE GRANTING
\$405M TOTAL ASSETS | 570 FUNDS



2019 – 2024

Fueling *Innovation*

As we continue to build a foundation for the future, OCCF reached a remarkable milestone with \$1 billion in cumulative granting achieved 18 months ahead of our November 2024 goal.

Partnerships and Initiatives:

Orange County Community Resilience Fund, African American Alliance Fund, Social Justice Fund, Promising Futures Orange County, and Avanzar Board Leadership Academy.

35 YEARS: \$1.1B CUMULATIVE GRANTING
\$695M TOTAL ASSETS | 650 FUNDS

CELEBRATING

35 years

OF IMPACT



[Scan for more stories and the full OCCF timeline.](#)

A LEGACY OF IMPACT

The Richard and Elizabeth Steele Fund

It started with a leap of faith.

A generous gift of charitable assets, entrusted to an emerging community foundation barely a year old, with a bold vision to become the center of gravity for philanthropy in Orange County. Who could have known that leap would become the foundation for a lifelong relationship, with unparalleled impact fueled by OCCF's own growth and development.

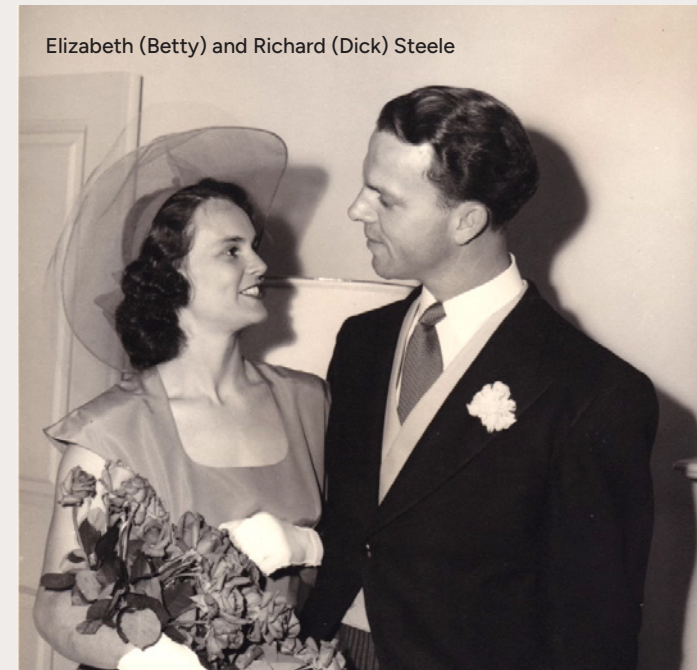
The Richard and Elizabeth Steele Fund, established in December 1990 as OCCF's first donor-advised fund with a contribution of \$241,500, stands as a living monument to the amplified power of giving through OCCF.

Richard (Dick) and Elizabeth (Betty) made additional gifts to their OCCF fund of a staggering \$23 million during their lifetimes, generating grants of nearly \$18 million to nonprofits in Orange County, across the country and around the world.

When Dick passed unexpectedly in 1996, OCCF supported Betty to honor his legacy while finding her own philanthropic voice. We worked closely with Betty for more than two decades, helping her support the causes closest to her heart, including health and human services, education, animal welfare, arts and culture and disaster relief, until her passing at the age of 96.

Upon Betty's passing in 2018, additional assets were received through her estate and the fund's principal was endowed, ensuring that its impact will continue to grow in perpetuity. With OCCF's astute investment oversight, an additional \$17.7 million in earnings has been added to the fund's value over time, so that today the endowment holds more than \$29 million in assets and generates annual support for local nonprofits totaling \$1.25 million—a significant charitable payout that will continue to grow over time.

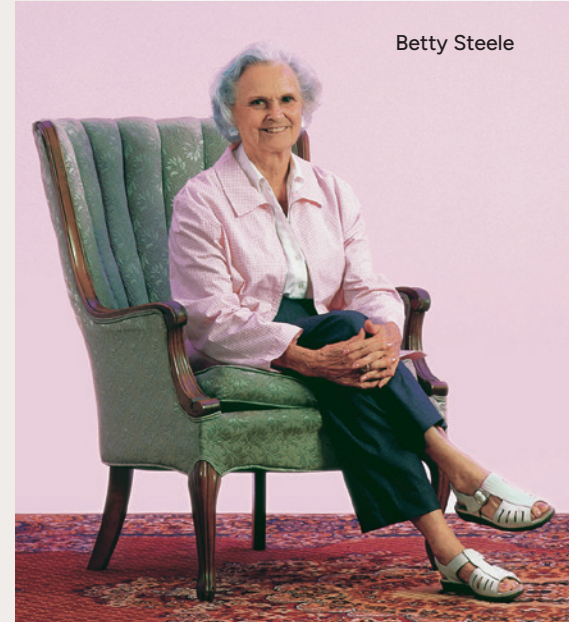
OCCF has been honored to steward Dick and Betty Steele's philanthropy during their lifetimes and beyond. What started as a leap of faith became a deep and trusting relationship of 35 years and counting, allowing the Steele's spirit of generosity to flourish for good, for ever.



Elizabeth (Betty) and Richard (Dick) Steele



Dick and Betty Steele



Betty Steele



Betty with her daughters Trish, Libby, and Anne

To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter.

- ARISTOTLE

OCCF TEAM

EXECUTIVE TEAM



Shelley Hoss
Chief Executive Officer



Tammy Tumbling
President



Tracy Branson
Chief Financial Officer



Cathleen Otero
Chief Operating Officer

LEADERSHIP TEAM



Margita Blattner
Philanthropic Strategy



Greg Cravens
Finance & Administration



Sharon Johnson
People & Culture



Monica Seely
Marketing & Communications



Carol Ferguson
Donor & Community Engagement



Keri Mesina
Donor & Community Engagement



Elaine Chen
Donor & Community Engagement



Uzoma Patrick Isebor
Innovation & Technology

DONOR & COMMUNITY ENGAGEMENT



Mayra Chavez



Joe Cordell



Michaela Dolium

EXECUTIVE OFFICE



Liz Brown



Rachel Lowenthal



Rachel Donawerth



Pia Flores



Thomas Moore



Austin Muckenthaler



Anastasia Dieter

MARKETING & COMMUNICATIONS

FINANCE



Priscilla Aguilar



Dan Ball



Matthew Nguyen

PHILANTHROPIC STRATEGY



Joanne Forster



Jenny Lucatero



Nicole Perry



Suzanne Preston



Luis Wences

PEOPLE & CULTURE



Edith Guefroudje

INNOVATION & TECHNOLOGY



Kevin Kim

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Rachid Chamtieh
Deloitte & Touche LLP



VICE CHAIR/SECRETARY
John M. Williams III
Gibson, Dunn & Crutcher LLP



FINANCE CHAIR
Kate Duchene
RGP

Welcoming our newest board members!



Anna Escobedo Cabral
Cabral Group



Tam T. Nguyen
Advance Beauty College



Fram Virjee
Association of Governing Boards of Universities
and Colleges

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



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

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CFNS

ACCREDITED
FOUNDATION

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