Advancing social impact by supporting, strengthening, and building adaptive leadership across our nonprofit and philanthropic community.
MESSAGE FROM THE 2020 & 2019 CHAIR

As incoming 2020 Chair and outgoing 2019 Chair of Orange County Grantmakers (OCG), we are pleased to present our first-ever Annual Report. As a community of funders and philanthropists, we are committed to improving outcomes for Orange County and beyond and our work in the last two years highlights our growth and dedication to this community.

Since 2006, OCG (then known as the Orange County Funders Roundtable) has served as a community for philanthropists in Orange County. Started initially as a peer-networking community that met just four times per year, we have now grown into a robust organization that helps to guide the discussion on issues important to funders and the nonprofit community. We are committed to continuing to serve as not only a convener for funders, but as a voice for the philanthropic community as a whole.

In the pages that follow, you will read about OCGs growth in the last two years. Our success however, is the result of the dedicated work of past advisory boards and executive administrators, supporting our evolution. In 2008, OCG launched our annual summit for nonprofit leaders, a countywide convening with the express purpose of supporting the nonprofit community. In 2015, the first program & membership committees came together, driving the content of member forums and identifying additional learning opportunities for membership. On behalf of the entire 2020 Advisory Board, it is our commitment that OCG will continue to grow and evolve, providing opportunities for learning and discussion for the funder and nonprofit community in Orange County.

Looking into 2020 and beyond, we are excited to continue to expand our leadership on far-reaching issues such as the Census and the OC Equity Profile. It is our belief that the success of our community is directly tied to our ability to lead and facilitate important and sometimes hard conversations. Through partnerships with other community organizations and through our internal leadership, OCG will continue to convene thoughtful and impactful discussions around equity, diversity, and public policy in Orange County. We look forward to continuing our mission of advancing social impact and building adaptive leadership across the nonprofit and philanthropic community.

We invite you to read this report and reflect along with us on our journey. We cannot wait to see what the next year will bring.

Jason Lacsamana  
St. Joseph Health Community Partnership Fund  
2020 Chair

Katie Ellis  
Opus Bank Foundation  
2019 Chair
GROWTH AS AN ORGANIZATION

REBRANDING

In 2018, after 12 years of being known as the Orange County Funders Roundtable, OCG rebranded as Orange County Grantmakers, bringing us in-line with other philanthropic serving organizations (PSOs) across the country. The name change ushered in a new focus on external engagement of the philanthropic and nonprofit community, more events and programs, and leadership on a variety of issues including equity and census.

2018 also saw OCG (then OCFR) bring on its first ever full-time staff. With Executive Director, Taryn Palumbo, at the helm, OCG was able to expand its programs and focus on increased membership and community engagement.

ORANGE COUNTY EQUITY REPORT

In March 2019, OC Grantmakers released the first Orange County Equity Profile, a comprehensive & regional specific report prepared by the University of Southern California Program for Environmental and Regional Equity (PERE) and PolicyLink.

This report describes the demographic and equitable growth trends in Orange County, includes a narrative around the broad benefits of equity and is backed by data and indicators disaggregated by race, ethnicity, nativity and gender. The report was the conclusion to efforts by a working group comprised of local funders, nonprofit and business leaders and government officials.

Contents of the report were released to the Orange County community at a free-event attended by over 250 nonprofit leaders. OCG’s equity work will continue in 2020, with a convening around common terminology and an integration of equity into our mission and programs.
2020 ORANGE COUNTY CENSUS

Responding to the urgency of the coming 2020 Census, OC Grantmakers joined with fellow funders and nonprofits from around California to advocate on behalf of a complete count of all Orange County residents. In addition to supporting OC census work, OCG joined with other community leaders to serve on the Executive Council of the Orange County Census Table, overseeing the $1.4 million dollars attributed to Orange County from the state and the additional $1 million matched by philanthropy.

OCG members supported the engagement of a dedicated consultant to lead the Orange County work and joined the Statewide Funders Table, focused on how philanthropy can support civic engagement around the census and coming issues like redistricting.

PUBLIC POLICY COMMITTEE

In 2019, Orange County Grantmakers established the first ever Public Policy Committee of the organization, developing guidelines and policies and procedures around engagement of policy issues. This committee, and the process put in place, allows OCG to take positions on issues of importance to the philanthropic community in Orange County including census, homelessness and housing. In support of OCG’s leadership on issues, the organization attended the Philanthropy CA led advocacy trip to Sacramento. This trip provided an opportunity for OCG to engage directly with elected officials for the first time, highlighting to our leaders the importance and impact of philanthropy in their districts.

ORANGE COUNTY COMMUNITY RELATIONS COUNCIL

In 2019, OCG brought the Orange County Community Relations Council into the organization as an affiliate group supporting corporate members and non-traditional grantmakers. Established in the 1970’s, integration with OCG allows for increased communication and engagement between community relations leads and more traditional grantmakers while still providing a dedicated space for best practices and idea sharing among corporate funders.
Every year, the funders of OCG join together to host a one-day summit for local nonprofit leaders. This event allows OCG members and Orange County nonprofit leaders to come together to learn, collaborate and grow.

Begun in 2008 as a way for the funder community to give back to Orange County nonprofits at the height of the recession, the summit has evolved from a 2-day “how to” convening of around 100 people, to a community wide celebration of 300 that brings together leaders from nonprofits across the county. Open to everyone from Executive Directors, CEOs, and Board Members to Development Directors, Program Officers and staff assistants, the day is an opportunity to discuss the “big ideas” and issues most impacting Orange County.

As the summit has evolved, so too has the impact of the summit. In 2019, the OC Grantmakers Annual Summit added on a social justice component, partnering with Bracken’s Kitchen and the Tiyya Foundation’s Flavors from Afar catering program to provide lunch and happy hour to all attendees. Through the opportunity drawings throughout the day, the summit also provided a chance for nonprofits to receive items benefitting their organization such as iPads and office tech, culminating in a $2,500 give-away from OCG.

In 2019, OCG joined forces with OneOC to host quarterly happy hours for the nonprofit community. These social events, in direct response to the request from nonprofits for more networking time, provide an agenda free space to connect with one another!

In response to the 2018 Annual Summit, OCG brought together four organizations that provide capacity building services to Orange County nonprofits for a casual "pitch" session. These four organizations, The Orange County Community Foundation, Fieldstone Leadership Network, OneOC and the Public Law Center, each had 4 minutes to share with attendees what they do and why it is so important. The over 50 nonprofit leaders in attendance then could connect with whichever organization best fit their needs.

**BUSINESS EQUITY ROUNDTABLE**

Building off the discussion started at the OC Equity Profile release event, OCG brought together business leaders that are not typically part of the conversation to discuss the “business case” of equity.

▲ Images: Clockwise from Top Left; OneOC HH: (1) Chapter One, The Modern Local, (2, 3, 4, 5) Happy Hour Guests networking and connecting with one another; Capacity Building HH: (6) Capacity Building Happy Hour Guests. (7) Speaker John Guastaferro, Anaheim Community Foundation, (8) Speaker Robin Sinclair, Fieldstone Leadership Network, OC.
COMMUNITY PARTNERSHIPS

IMMIGRANT INTEGRATION SUMMIT

On September 5th, representatives of philanthropic and nonprofit organizations spent the day together, learning and talking through how we can welcome, embrace, respect, and support immigrants in Orange County. Through immigrant integration, we all have the opportunity to participate in the economic and social health and wellbeing of the region.

The summit was a chance to go deeper and discuss how promoting immigrant integration is key to creating a more equitable region, and a pathway to inclusive growth and prosperity. Attendees took an in-depth look at the intersections of immigration and higher education, legal services, and policy change in Orange County.

HOMELESS ROUNDTABLE

In April 2019 OCG and the Health Funders Partnership joined together to host a discussion around the health of the homeless population in Orange County. This panel brought together leaders from healthcare agencies, nonprofits and local government to share best practices, address systematic barriers to success, and identify collaborative opportunities in the future.

▲ Images: Clockwise from Top Left; Immigrant Integration Summit: (1, 2) Immigrant Integration Summit Attendees posing for pictures, (3) Immigrant Integration Summit Panelists, (4) Integration Summit Attendees.
COMMUNITY LEADERSHIP

- OC Equity Profile integration in the First5 Summit
- Speaking opportunities at the OC Forum & Association of Fundraising Professional OC Luncheon
- OC Census Table Executive Team
- Huntington Beach Complete Count Committee
- Exponent Philanthropy 2020 Conference Leadership Committee

NATIONAL PRESENCE

- Membership in the United Philanthropy Forum beginning in 2018
- Membership with PEAK Grantmaking beginning in 2019
- Membership with Grantmakers for Effective Organizations beginning in 2019
- Partnership with Grantmakers Concerned with Immigrants & Refugees (GCIR)
- Partnership with Exponent Philanthropy

▲ Images: Clockwise from Top Left; OC Equity Profile: (1) Over 280 attendees for a more equitable Orange County, (2) OCG Chair Katie Ellis & Vice Chair Jason Lacsamana introduce Dr. Manuel Pastor from USC, (3) Panelists at the OC Equity Profile Presentation; OC Forum & Association of Fundraising Professionals: (4, 5) Speakers at the OC Forum discussion on Philanthropy including OCG ED Taryn Palumbo.
## BY THE NUMBERS

### MEMBERSHIP

<table>
<thead>
<tr>
<th>Total Members</th>
<th>36</th>
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<tbody>
<tr>
<td>7</td>
<td>New Members</td>
</tr>
<tr>
<td>94.6%</td>
<td>Retention Rate</td>
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### PROGRAMS

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<tr>
<th># of Programs for Funders</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>'18</td>
<td>7</td>
<td>6</td>
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<tr>
<td>'19</td>
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</table>

<table>
<thead>
<tr>
<th># of Programs for Nonprofits</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>'18</td>
<td>4</td>
<td></td>
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<tr>
<td>'19</td>
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<td>6</td>
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### ANNUAL SUMMITS

<table>
<thead>
<tr>
<th>2018: Building our Movement</th>
<th>Registered: 280</th>
<th>Attended: 240</th>
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</thead>
<tbody>
<tr>
<td>2019: Leading Towards Equity</td>
<td>Registered: 317</td>
<td>Attended: 290</td>
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GET ON THE MAP

ABOUT THE PARTNERSHIP

In 2019, OCG partnered with “Get on the Map”, encouraging all OC funders to join the nationwide campaign with Foundation Center to make current grants data available through Foundation Maps, the Center’s online interactive mapping platform.

With the “Get on the Map” platform, members can:

- View grants data by Grantmakers or Recipients
- View grants data on a map or as a list
- Utilize search filters such as location, population served, grant amount, etc.
- Find others who are funding in your areas of interest
- Assess funding portfolios and plan for the future
- Demonstrate the scope and reach of your philanthropy
LEADERSHIP

ADVISORY BOARD

2018

Katie Ellis, Opus Bank
Jason Lacsamana, St. Joseph CPF
Gwyn Grenrock, Allergan
Dan Stetson, Nicholas Endowment
Robin Sinclair, Fieldstone
Amber Skalsky, PIMCO
Terrie Doizaki, Weingart Foundation
Jack Toan, Wells Fargo
Amanda Fowler, Edwards Lifesciences

2019

Katie Ellis, Opus Bank
Jason Lacsamana, St. Joseph CPF
Gwyn Grenrock, Allergan
Dan Stetson, Nicholas Endowment
Robin Sinclair, Fieldstone
Amber Skalsky, PIMCO
Terrie Doizaki, Weingart Foundation
Jack Toan, Wells Fargo
Nithin Jilla, Tarsadia Foundation
Adriana Galdamez, Cox Communications
SUMMIT COMMITTEE

2018

- Amber Skalsky, PIMCO
- Jason Lacsamana, St. Joseph Health Community Partnership Fund
- Sandy Chiang, California Endowment
- Carla Vargas, United Way
- Tere Segarra, Pacific Life
- Cathleen Otero, Orange County Community Foundation
- Anne Olin, The Olin Group
- Mark Lowry, Community Action Partnership
- Meymuna Hussein-Cattan, Tiyia Foundation
- Vattana Peong, The Cambodian Family Community Center
- Ameera Basmadj, Access CA Services
- Sylvia Kim, Asian Americans Advancing Justice
- Georgina Maldonado, Community Health Initiative of Orange County
- Dan Stetson, Nicholas Endowment
- Gabriela Robles, St. Joseph Health Community Partnership Fund
- Robin Sinclair, Fieldstone Leadership Network
- Rosemary Krupp, Western Digital
- Rossina Gallegos, Union Bank

2019

- Amber Skalsky, PIMCO
- Nithin Jilla, Dreams for Schools
- Jessica Carbajal, American Career College
- Saki Uemura, Kingston Technology
- Cathleen Otero, Orange County Community Foundation
- John Guastaferro, Anaheim Community Foundation
- Vattana Peong, The Cambodian Family Community Center
- Khushbindar Kaur Sood, Orange County Human Relations
- Lauren Peterson, OneOC
- Mostafa Mahboob, Council on American Islamic Relations
- Mary Anne Foo, Orange County Asian and Pacific Islander Community Alliance

PROGRAM & MEMBERSHIP COMMITTEE

2018

- Dan Stetson, Nicholas Endowment
- Gabriela Robles, St. Joseph Health Community Partnership Fund
- Robin Sinclair, Fieldstone Leadership Network
- Rosemary Krupp, Western Digital
- Rossina Gallegos, Union Bank
- Sarah Bowles, JP Morgan Chase
- Shelley Hess, Orange County Community Foundation
- Vicki Booth, Ueberroth Family Foundation
- Casey Haack, Cox Communications
- Minzah Malik, Hoag Memorial Hospital Presbyterian

2019

- Casey Haack, Cox Communications
- Dan Stetson, Nicholas Endowment
- Minzah Malik, Hoag Memorial Hospital Presbyterian
- Robin Sinclair, Fieldstone Leadership Network
- Rossina Gallegos, Union Bank
- Sara Garske, Larry & Helen Hoag Foundation
- Sarah Bowles, JP Morgan Chase Foundation
- Vicki Boot, Ueberroth Family Foundation

PUBLIC POLICY COMMITTEE

- Jack Toan, Wells Fargo (Chair)
- Sandy Chiang, California Endowment
- Amber Skalsky, PIMCO
- Adriana Galdemez, Cox Communications
- Bob May, David A. Pyle Family
- Michelle Murphy, United Way
Join us, as we continue to lead the way through collaboration, convening, leadership and advocacy.

All funders, philanthropists, foundations and grantmaking organizations are welcome to join. Member organizations must fund a minimum of $250,000 in Orange County, but funding can be through in-kind donations, grant making, direct contributions, or nonprofit organizational support.

Organizations that both make and receive grants are welcome, so long as attending members have the primary responsibility of contributions on behalf of their organization in Orange County.

First Year rate: $1,000

To learn more, contact Taryn Palumbo, Executive Director at: taryn.palumbo@ocgrantmakers.org