



TEN YEARS OF  
SOCIAL INNOVATION:  
2007-2017

2016 Annual Report



**Charitable Ventures**  
of Orange County



The mission of Charitable Ventures of Orange County is to encourage, support and facilitate innovative regional nonprofits and initiatives.

As nonprofits face increasingly complex social issues in a competitive philanthropic environment, fiscal sponsorship becomes a powerful platform to:

- **Promote social innovation**
- **Address emerging community challenges**
- **Test innovative ideas for significant investment**
- **Highlight new and promising ideas in the philanthropic marketplace**

Charitable Ventures of Orange County was launched to address these challenges and has built a strong fiscal sponsorship platform to support promising initiatives.

We envision a social sector where emerging and innovative charitable efforts can launch and test their ideas in a supportive and rigorous environment.

## Message from the Board

In September 2007, Charitable Ventures was launched to encourage the growth of innovative nonprofit solutions for social challenges and public benefit. Today, as a part of the growing movement of fiscal sponsorship dedicated to best practices and building effective solutions, CVOC is an independent nonprofit organization providing innovative projects with incubation and support to solve problems in their own communities.

Since our founding, CVOC has sponsored more than 55 individual projects, several of which have incorporated, and a growing number of regional initiatives with impact in Orange County and beyond. Together, these emerging projects have raised more than \$15 million in philanthropic investment to bring their innovative ideas to impact communities in need. Our projects span many important local issues such as community development, health, social justice, education, and food insecurity.

The Board and Staff of Charitable Ventures is ready to take our platform to the next level, providing deeper coaching and planning support for projects, serving as fiscal agent for state and federal grants that can impact large scale problems, sponsoring important initiatives, and supporting regional partners.

We are proud of our sponsored projects and amazed at what indigenous efforts can accomplish in their own communities with encouragement and support.

We look forward to 10 more years of innovation, incubation, and investment with hope for a healthy, vibrant future for all our communities. We plan to be here with them every step of the way.

Ready for the next 10 years of innovation, incubation, investment and hope

## Ten Years of Social Innovation and Incubation

Strengthened community development, health, social justice, food insecurity, education and many other missions



Raised more than \$15 million in philanthropic investment



Sponsored more than 55 projects



Launched in September 2007



# 20

07

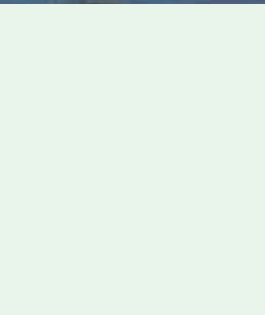
Public Law Center provides pro bono support to help CVOC submit for 501c3 status; OCCF provides seed funding



08



CVOC sponsors the Santa Ana Building Healthy Communities initiative, a California Endowment 10-year investment



10

South Laguna Community Garden joins CVOC



CVOC reaches \$1million in revenue across 16 projects



Blue Shield grants \$1.9M to OC Women's Health Project to support the creation of a new Health and Domestic Violence system in Orange County

Madison Park Neighborhood Association joins CVOC



# 12

Santa Ana Building Healthy Communities helps pass Sunshine Ordinance in Santa Ana



OC Women's Health Project holds inaugural Orange County Women's Health Policy Summit at UC Irvine



# 13

Project Kinship launches Re-entry initiative with initial landscape analysis of services and \$25,000



# 14



Community Alliance for Birthing Options incorporates and launches



CVOC provides a home for the San Geronio Outdoor Science Camp, which serves 3,000 Title 1 School 5th graders each year

# 15

CVOC joins The Olin Group and the OC Alliance for Children and Families to become the FaCT Coalition, the administrative hub for a network of regional Family Resource Centers.



Strength in Support, a veterans support initiative, incorporates and launches



City of Anaheim "State of the City" raises \$75,000 for ACT Anaheim, an initiative for at-risk youth

# 16



CVOC starts new partnership with Opportunity Fund, a statewide CDFI, to help expand micro-lending in underserved communities within Orange County



Boys & Men of Color and RAIZ merge to become Resilience Orange County, focusing on youth and immigration



# 17

Project Kinship raises \$1M in revenue, and its 4th Public Safety and Re-entry conference attracts almost 300 stakeholders from law enforcement, probation, community based organizations and universities

CVOC looks to the future to grow our initiatives and services



## Looking Back 10 Years

*Since our inception in 2007, we have had the privilege of working with more than 55 projects\* with a heart and a vision for change.*



### OC DEAF LITERACY PROJECT

*We're so proud to be one of the projects that have been with Charitable Ventures of Orange County for almost a decade! In looking back on this past year, I think the thing I'm most proud of is that our high school students had an opportunity to give back, and impact these young children in ways they themselves may not fully appreciate. Doesn't get any better than that!*

360 Turnaround Youth Diversion Program (2011) · American Amplifier (2016) · California Network of Family Strengthening (2011) · Chispa (2017) · City of Santa Ana - Grants for Parks (2008) · The UCI Child Development School Capital Campaign (2012) · DeColores Queer (2014) · FaCT Network of Administrative Services (2015) · Health Scholars (2014) · Human Trafficking (2015) · Kathi Koll Foundation (2015) · Leadership for Orange County (2016) · Lives Worth Saving Gang Intervention (2011) · Map of Family Support and Strengthening Networks (2015) · Next Up Foundation (2014) · OC Adult Day Services Coalition (2015) · Orange County Women's Health Project (2011) · Partnerships for a Brighter Future (2015) · Pathways to Opportunity (2016) · San Geronimo Outdoor Science School (2014) · Santa Ana Building Healthy Communities HUB (2013) · Santa Ana Blocks (2013) · Schea Cotton Foundation (2014) · Social Enterprise Academies (2009) · Solar the Sign (2010) · South Laguna Foundation (2013) · Strength in Support (2013) · Supercharged for Mito (2011) · TEDxYouth (2015) · The Milt Olin Foundation



### RESILIENCE OC

*Resilience is an organization that was created in 2016 out of the merging of two established organizations RAIZ (Resistencia Autonomia Igualdad y lideraZgo) and Santa Ana Boys and Men of Color. Our merge manifested in creating an infrastructure to limit organized deportations and help youth in Santa Ana and Men of Color to address issues that affect them.*





**SAN GORGONIO OUTDOOR SCIENCE SCHOOL**

*Our founding members have had the same vision for over 30 years, to establish an Outdoor Science School that would provide students with a life enriching experience in the beautiful San Bernardino Mountains. In July of 2014 our dream became a reality. Since 2014, they have served over 9,000 students, most from Title I schools, and continue to grow. So far, our proudest achievement is we have not had one student taken off site for medical assistance in our two plus years of existence.*

**ing Networks (2013) · CareerWise (2010) · Caterina’s Club (2011) · Child Creativity Lab (2014) · Chinese character day  
aign (2012) · Community Roots (2009) · Community Alliance for Birth Options (2008) · Crossnore School Film Project  
fficking and Social Injustice (2014) · Immigration Learning Series (2014) · Jewish Addiction Awareness Network (2016) ·  
Madison Park Neighborhood Association (2011) · Mariposa Domestic Violence Benefit Concert (2017) · National Network  
(2008) · OCCares (2013) · Orange County Deaf Literacy Project (2010) · Orange County Homelessness Collaborative  
rtunities (2011) · People for Housing (2017) · Project Kinship (2013) · Red for Life (2011) · RAIZ (2014) · Resilience OC  
Santa Ana Collaborative for Responsible Development (2016) · Santa Ana Boys & Men of Color (2013) · Santa Ana Grants for  
una Civic Association/South Laguna Community Garden Park (SLCGP) (2012) · Sports Conditioning and Rehabilitation  
ation (2014) · Workshop for Community Arts (2016)**

**SANTA ANA BUILDING HEALTHY COMMUNITIES**

*We are a ten-year comprehensive community initiative that is creating a revolution in the way Californians think about and support health in their communities. SABHC is committed to addressing health inequities and improving opportunities for a healthy, thriving Santa Ana.*



**PROJECT KINSHIP**

*Founded in 2013, the mission of Project Kinship is to increase community, safety, promote hope, health and well-being among the formerly incarcerated and their families. Project Kinship continues to work hard and bring hope to these individuals where redemption and second chances are possible to achieve.*

*\*Projects in bold are still with us; underlined projects have incorporated, launched and continue to do work in the community.*

**Thank You  
to Our Donors  
and Supporters**

**Our projects could not achieve their missions without the generous support of our major funders and donors who believe in social innovation and community support. We thank the foundations, corporations and government entities listed here for providing support to our projects in 2016, as well as the more than 200 individual donors who contributed to our projects.**

Aetna Inc.  
Altschul Olin & Vandergast, LLP  
Anaheim Ducks Hockey Club, LLC  
Andrei Olenicoff Memorial Foundation  
Angels Baseball  
Aramark Sports & Entertainment Services  
Argyros Family Foundation  
Asian Americans Advancing Justice Los Angeles  
AT&T California  
August Law Group, PC  
Axiom  
Bank of America Corporation  
California Arts Council  
California United Bank  
CalOptima  
Center for Cultural Innovation  
Chapman University  
City of Anaheim Public Utilities Department  
City of Santa Ana  
Core Communications Group, LLC  
CSULB Research Foundation  
David Schwartz Foundation, Inc  
DaVita, total Renal Care, Inc.  
Desert Sands Public Charter, Inc.  
Disney Worldwide Services, Inc.  
FEI Marketing, Inc.  
Fross Zelnick Lehrman & Zissu, P.C.  
Full Staging Production Services, Inc  
Fullerton College Bursar  
George & Gretchen, Inc.  
Hoag Memorial Hospital Presbyterian  
Institutional Property Advisors  
JCLHCA05, LLC  
Jean Perkins Foundation  
Jewish Community Foundation of Orange County  
JPI  
Kaiser Permanente  
Liberty Hill Foundation  
Maxlite  
Miller Toyota of Anaheim  
Milton Group, LLC  
Movement Strategy Center  
MUFG Union Bank, N.A.  
National Day Laborer Organizing Networks  
NBH Communications

Nederlander Grove, LLC  
Oakley  
Orange County Community Foundation  
Pacific West Association of Realtors  
Pandor Anaheim Packing House  
Parsangi Dental Corporation  
Planned Parenthood of Orange & San Bernardino  
Public Law Center  
Quality Start OC- Orange County Department of Education  
Red Eye Media  
Robert Wood Johnson Foundation  
Rutan & Tucker, LLP  
Sabor, Russell Foundation Agency  
SC Fuels  
SEI Private Trust Company  
Sheldon Development, LLC  
Sisters of St. Joseph Healthcare Foundation  
SoCalGas  
Susan G. Komen Orange County  
Taco Bell Corp.  
Tait Environmental Services, Inc.  
Tenet Healthcare  
The Allergan Foundation  
The Allstate Foundation  
The California Endowment  
The Cashion Foundation  
The CorMura Foundation  
The Daniel and Francine Scinto Foundation  
The Dorothy Cate and Thomas F. Frist Foundation  
The Fran & Ray Stark Foundation  
The Francesca Ronnie Primus Foundation, Inc  
The Frida Cinema  
The James Irvine Foundation  
The Lucky Group, Inc.  
The Merage Institute  
The William E. Connor Foundation  
Thomas & Pauline Tusher Family Fund  
Townsend Public Affairs, Inc.  
University of California Irvine  
University Synagogue  
Wells Fargo  
Wells Fargo Foundation  
West Coast Arborists  
Westside Building Materials  
Youth Speaks



## Looking into the Future

After ten years of its own incubation with The Olin Group, CVOC looks forward to fulfilling its mission as a fully integrated, independent community resource for Orange County. Building on its own community engagement, CVOC is ready to become sustainable with a pure earned income model and a growing partnership with OCCF. Although we continue to welcome small-size fiscal sponsorship and startup efforts, our growing platform now includes more complex projects and the financial management issues that they bring.

An experienced staff and an independent Board has prepared CVOC to move beyond fiscal agency alone. We now mentor and grow young risky projects and have become a platform for regranting programs, Federal Grant management for the region and even special projects such as micro lending which have the potential to position and enhance the nonprofit sector to meet challenge of the complex pattern of growth Orange County is facing.

Our future presents all the challenges of growth, but our history shows our potential to meet those challenges, and to bring our expertise to bear in supporting complicated relationships across the region. We look forward to leveraging our investment in the Orange County nonprofit sector on behalf of all of our clients and the community.



## Our Team

### Board



**Anne Olin**  
*Board Chair*

President,  
The Olin Group



**John C. Rohrer**  
*Board Treasurer*

Coach, Executive Service Corps,  
Retired Business Executive



**Dale Larson**  
*Board Secretary*

Professor Emeritus,  
Irvine Valley College



**John Benner**  
*Board Member*

Coach, Executive Coaches  
of Orange County,  
Retired Business Executive



**Stephen Kight**  
*Board Member*

Former Chief Strategy Officer,  
OC Partnership/Ten Year Plan  
to End Homelessness

### Staff



**Ted L. Kim**  
*Chief Operating Officer*



**Susan Winterhoff**  
*Human Resources and Program Director*



**Jin Won, CPA**  
*Controller*



**Adilea Soto**  
*Administrative Assistant*

### Advisors



**Todd M. Hanson**  
Vice President,  
Center for Engaged  
Philanthropy  
OCCF



**Debra Legan**  
Vice President of Marketing,  
Business Development and  
Community Benefit  
PIH Health



**Ryan Lee Maughan**  
Associate Attorney,  
Everett Dorey, LLP

**Guzman & Gray CPAs**  
Patrick Guzman, *CPA*

**Rutan & Tucker, LLP**  
Edson McClellan, *Partner*

**Fohrman & Fohrman, Inc.**  
Greg Gebhardt, *Accounting Director*  
Bonnie Guthrie, *Accountant*

**NEO Law Group**  
Gene Takagi, *Managing Attorney*  
Erin Bradrick, *Senior Counsel*

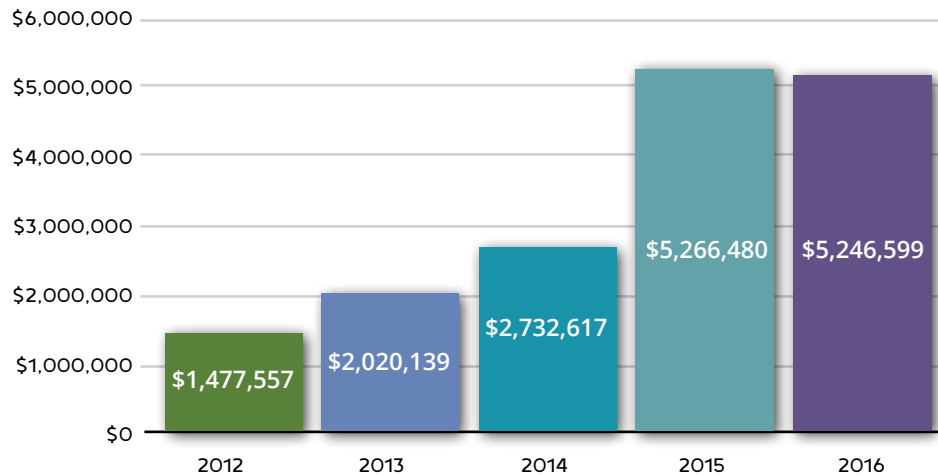
**KTimeHR**

## Financials

### Charitable Ventures of Orange County Statement of Financial Position 2016

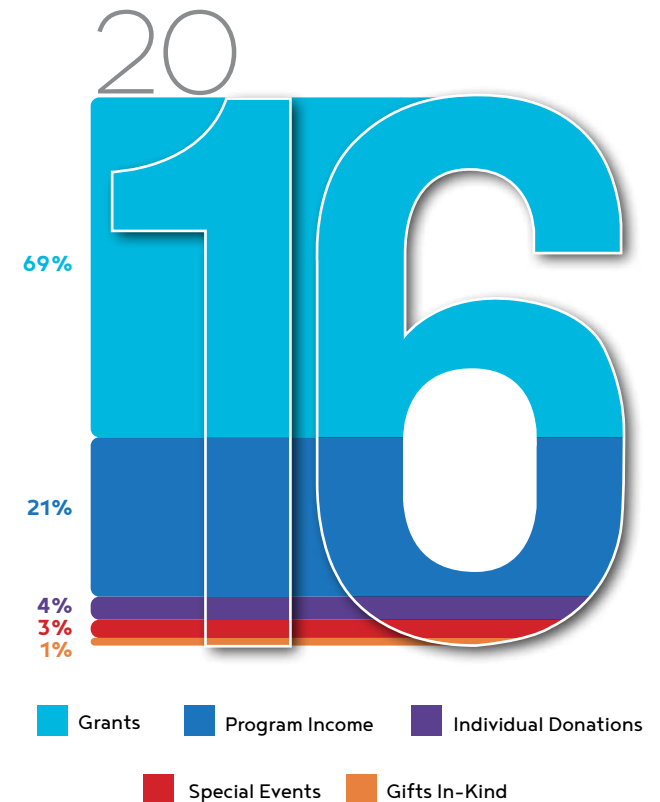
	2016
<b>ASSETS</b>	
Cash & Cash Equivalents	\$ 2,181,025
Contracts and Grants Receivable	137,911
Pledges Receivable	64,116
<b>TOTAL ASSETS</b>	<b>2,383,052</b>
<b>LIABILITIES</b>	
Payables	82,644
Accrued Expenses	107,215
Deferred Revenue	1,133,431
<b>TOTAL LIABILITIES</b>	<b>1,323,290</b>
<b>NET ASSETS</b>	
Unrestricted	83,202
Temporarily Restricted	976,560
<b>TOTAL NET ASSETS</b>	<b>1,059,762</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 2,383,052</b>

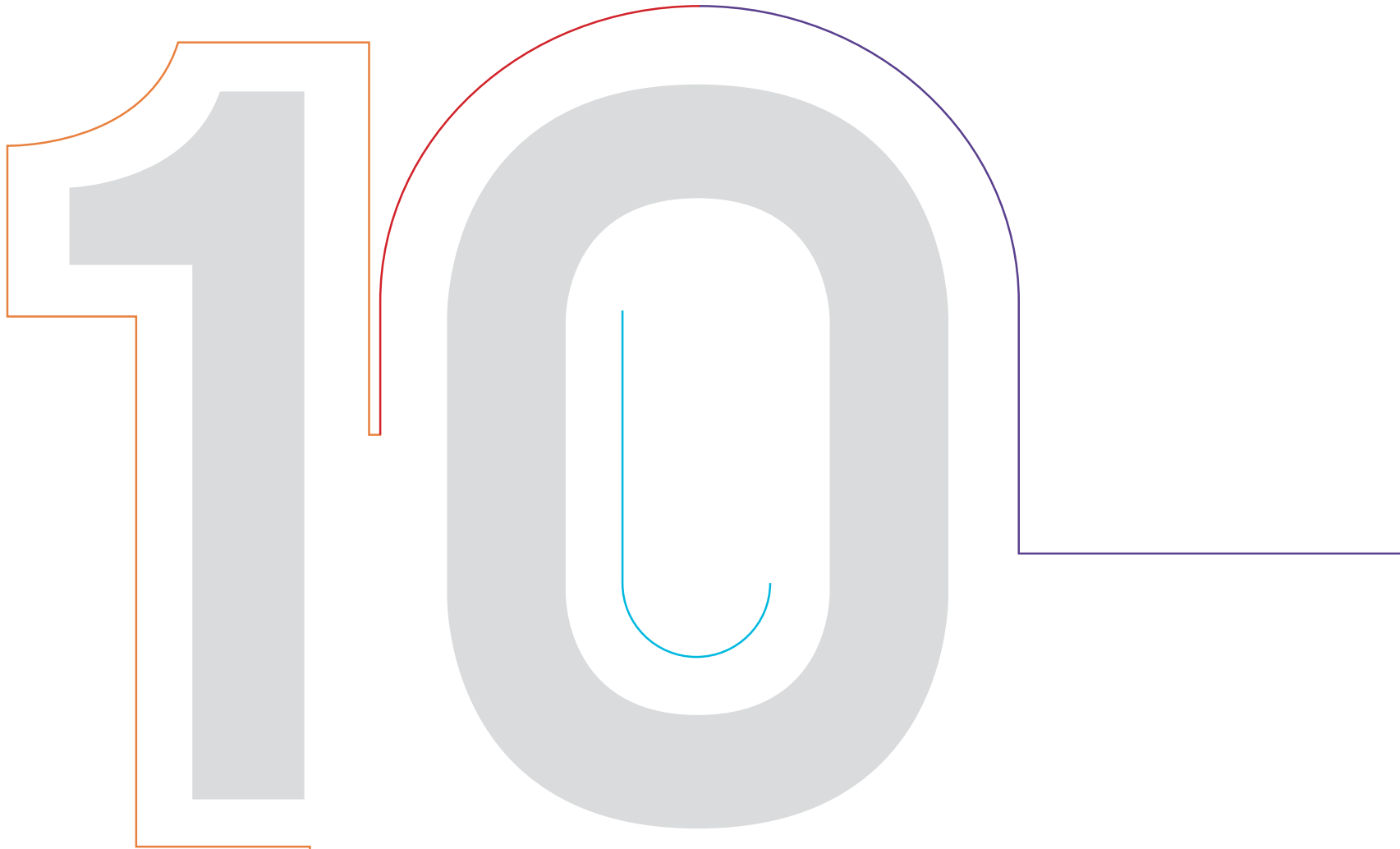
### Funds raised, 2012 - 2016



### 2016 Revenue

Individual Donations	\$ 225,673
Program Income	\$ 1,152,523
Grants	\$ 3,647,570
Special Events	\$ 158,698
Gifts In-Kind	\$ 62,135
<b>TOTAL INCOME</b>	<b>\$ 5,246,599</b>





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