Dear Community Partners,

We are pleased to share the 2017 Annual Report reflecting Charitable Ventures’ 10th year of providing fiscal sponsorship and incubation support to passionate community leaders and transformative projects. Since 2007, Charitable Ventures has supported more than 57 projects in their journey to serve the vulnerable and change communities. Many of these projects are continuing to make an impact.

As we look back on our first of hopefully many decades, we – the staff, board and key partners of Charitable Ventures of Orange County – are amazed at the journey.

From the sponsorship of our first small project, to the past year’s deep engagement with large regional initiatives and more than $5.5 million in funds under management, the organization has grown to meet the challenges, needs and opportunities brought to us by our projects and partners.

The report that follows focuses on the impact our projects had in the community last year, highlights the innovative efforts of our projects, and underscores the powerful support that donors, sponsors and foundations have committed to the financial health of the organization.

Thank you for your support and engagement in this important mission.

The Board and Staff of Charitable Ventures of Orange County

Our Mission

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:

1. PROMOTE social innovation
2. ADDRESS emerging community challenges
3. ATTRACT investment
4. HIGHLIGHT new and promising ideas

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 ideas in a supportive and rigorous environment.
The Power of Fiscal Sponsorship

Fiscal sponsorship is a relationship between a 501(c)3 nonprofit and an emerging project that needs administration and management, but that doesn’t yet have its own tax exempt status. Often these projects are “testing a concept” on the philanthropic market, or trying to meet a critical need in the community, and they need a safe space to do so. Small projects with start-up budgets could easily spend as much as 20-40% of their operating budget on management and compliance issues. At Charitable Ventures, projects keep 91% or more of all the funds they raise for staff and programs, letting CVOC to take care of the rest.

The Role of Incubation

When a project begins to move toward a successful launch of independent operations, you can feel it. There is nothing more exciting than seeing an “idea” become a viable and sustainable effort on behalf of the community. More than just sponsorship, these projects need coaching and technical assistance to build the infrastructure that will ensure their business success. Incubation is about systems development, financial planning, organizational design, and long-term sustainability. CVOC staff works side-by-side with our project leaders to make sure they have the resources to succeed once they leave our platform.
In 2016, Marla Kaufman founded the **Jewish Addiction Awareness Network (JAAN)**. It was through Marla’s and her family’s experience navigating the journey alongside a loved one who struggles with substance use disorder that she first became aware of the lack of recovery resources for families in the Jewish community grappling with addiction. JAAN works to bring more attention to the addiction epidemic, and to increase support and innovative programming for the many Jewish lives affected by the disease.

JAAN collaborates with a diverse range of clergy, communal professionals and organizations, synagogues, lay leaders, and individuals, thoughtfully crafting programs focused on education, advocacy, stigma reduction, celebration of recovery, resource awareness, and supporting those in crisis.

JAAN’s Orange County partners include Jewish Federation and Family Services, synagogues and groups across the Jewish spectrum, and the Jewish Community Foundation that has generously funded many of JAAN’s programs with grants, allowing JAAN to offer a wide range of ongoing addiction and recovery programs locally. Rabbi Heidi Cohen of Temple Beth Sholom in Santa Ana remarked, "JAAN has transformed the conversation on addiction in our community."

JAAN also piloted a clergy and Jewish communal professionals workshop that includes sessions titled “It Happens Here: Addiction in the Jewish Community,” and “Beyond Prevention: A Jewish Family Faces Addiction.” With its partners, JAAN sponsors quarterly “Serenity Shabbat (Sabbath)” services that move around the county, and center around awareness, and relating Jewish practice and wisdom to the spiritual practice of recovery.

Other Jewish communities across the nation have taken note and are interested in replicating JAAN’s model. JAAN has gone on the road to conduct workshops in Atlanta, Detroit, Cleveland, Houston, and Washington, D.C. with plans to visit and consult with more communities.

In September, JAAN launched its comprehensive resource website, a place for information, connection, and many voices sharing Jewish perspectives on this issue. In addition, JAAN was awarded a grant to develop and pilot a Jewish cultural sensitivity curriculum for addiction treatment and mental health professionals.
15 FaCT Family Resource Centers provided family strengthening services to 16,359 individuals and 6,556 families

FaCT Orange County is a public-private partnership between the County of Orange Social Services Agency and Charitable Ventures of Orange County. Driven by the belief that all children deserve to grow up in stable, nurturing families and in safe, supportive communities, FaCT works to promote prevention and intervention services designed to reduce the risk of child abuse and neglect.

At the core of FaCT’s mission is their philosophy that abuse can be prevented before it starts by strengthening at-risk families. FaCT strengthens these families and our community by supporting a network of family resource centers (FRCs) and community agencies dedicated to promoting stronger family systems. Designed to nurture the positive assets and characteristics that will promote healthy behaviors even in stressful times, FaCT developed its FRC programs to encourage what are known as the Five Protective Factors:

- Concrete Support in Time of Need
- Parental Resilience
- Knowledge of Parenting and Child Development
- Social and Emotional Competence of Children
- Social Connections

To ensure children, parents and families receive best practice services, FaCT provides training, technical assistance and community engagement to the 15 FRCs. Through the FaCT FRCs, Orange County families have access to nine core services including: counseling, case management, adoption promotion, out-of-school time youth programs, domestic violence personal empowerment programs, family reunification activities, family support services, parenting education, and information and referral services.

Building for the future, the FaCT team of professionals continue to work behind the scenes to strengthen the network through:

- Training programs and technical assistance to FaCT FRCs and affiliated organizations
- Annual conference for family strengthening professionals
- Evaluation and data collection support services
- Pursuit of new community partnerships to strengthen the service network
- Identification and pursuit of new grant opportunities for the network
- Community leadership development of residents in each FRC neighborhood
- Public awareness campaigns and on-going advocacy for child abuse prevention
Since 2007, Charitable Ventures of Orange County has sponsored and supported more than 57 projects across our core areas of focus – Social Justice, Children & Families, Community, Education, and Health. We are proud to support the following current projects.

<table>
<thead>
<tr>
<th>Social Justice</th>
<th>Children &amp; Families</th>
<th>Community</th>
<th>Education</th>
<th>Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Project Kinship</td>
<td>• Families and Communities Together (FaCT)</td>
<td>• OC Grantmakers</td>
<td>• San Gorgonio Outdoor Science School</td>
<td>• Orange County Women’s Health Project</td>
</tr>
<tr>
<td>• Resilience OC</td>
<td>• Madison Park Neighborhood Association</td>
<td>• South Laguna Community Garden Park</td>
<td>• Círculos</td>
<td>• Jewish Addiction Awareness Network</td>
</tr>
<tr>
<td>• Santa Ana Building Healthy Communities</td>
<td>• 360 Turnaround Youth Diversion Program</td>
<td>• Partnerships for a Brighter Future</td>
<td>• Orange County Deaf Literacy Project</td>
<td>• Kathi Koll Foundation</td>
</tr>
<tr>
<td>• Chispa</td>
<td>• State of the City of Anaheim</td>
<td>• Leadership for Orange County</td>
<td>• Hispanic Education Endowment Fund</td>
<td>• Raising Teens</td>
</tr>
<tr>
<td>• People for Housing</td>
<td></td>
<td>• Santa Ana Grants for Blocks</td>
<td>• Roadrunner Trojan Alumni Association</td>
<td>• OC Adult Day Services Coalition</td>
</tr>
<tr>
<td>• DeColores Queer</td>
<td></td>
<td>• Workshops for Community Arts</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People Reached Through Social Justice Programs</th>
<th>Families provided services at Family Resource Centers</th>
<th>Community Garden Volunteers</th>
<th>Scholarships Awarded to Hispanic Students</th>
<th>People Reached Through Health Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>11,312</td>
<td>6,556</td>
<td>260</td>
<td>77</td>
<td>2,033</td>
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</tbody>
</table>
# Financials

## Statement of Financial Position 2017

### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Cash Equivalents</td>
<td>$2,669,267</td>
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<tr>
<td>Contracts and Grants Receivable</td>
<td>$297,789</td>
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<tr>
<td>Pledges Receivable</td>
<td>$9,852</td>
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<tr>
<td>Properties and Equipment</td>
<td>$12,205</td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$2,989,113</strong></td>
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</table>

### LIABILITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payables</td>
<td>$86,993</td>
</tr>
<tr>
<td>Accrued Expenses</td>
<td>$161,228</td>
</tr>
<tr>
<td>Grant Advance</td>
<td>$1,692,848</td>
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<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$1,941,069</strong></td>
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</tbody>
</table>

### NET ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
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<tbody>
<tr>
<td>Unrestricted</td>
<td>$83,423</td>
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<tr>
<td>Temporarily Restricted</td>
<td>$964,621</td>
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<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>$1,048,044</strong></td>
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</table>

## Funds Raised, 2015 - 2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>2015</td>
<td>$5,266,480</td>
</tr>
<tr>
<td>2016</td>
<td>$5,246,599</td>
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<tr>
<td>2017</td>
<td>$5,527,920</td>
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</table>

## INCOME

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Income</td>
<td>$1,448,758</td>
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<tr>
<td>Individual Donations</td>
<td>$261,802</td>
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<tr>
<td>Gift In-Kind</td>
<td>$44,245</td>
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<tr>
<td>Special Events</td>
<td>$370,307</td>
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<tr>
<td>Grants</td>
<td>$3,402,808</td>
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<tr>
<td><strong>TOTAL INCOME</strong></td>
<td><strong>$5,527,920</strong></td>
</tr>
</tbody>
</table>
Charitable Ventures is proud to have partnered with the following new projects in 2017:

**Advocating for Affordable Housing in Orange County**

The mission of People for Housing is to bring together the people most impacted by high housing cost and empower them to advocate for the housing they need in their communities. Executive Director, Elisabeth Hansburg hopes to bring attention to this issue and advocate for YIMBY (Yes In My Back Yard)!

**Higher Education for Hispanic/Latino Students**

Hispanic Education Endowment Fund (HEEF) has existed for more than 25 years and has awarded over $2 billion to youth in Orange County to help overcome financial barriers.

**Providing Mental Health and Wellness resources to Adolescents**

Raising Teens Foundation promotes mental health and wellness resources for teenagers during unsettling times. Raising Teens provides adolescents with coping skills and educates in the form of assemblies and workshops. Their programs and workshops are made available to underserved students in local or regional communities and schools that do not have proper funding to do so.

**Super School Revolutionizing Public Education**

Círculos is a public school redefining public education by implementing a new model of teaching that focuses on three principles: Flexible Learning Environments, Place – Based Learning, and Small Learning Communities & Circles. Thought of as a “school without walls”, Círculos offers students a personalized learning experience, by building structures and practices that enhances opportunities for student voice and choice in their learning.

**A support platform for Deaf and Hard of Hearing Students**

Roadrunner Trojan Alumni Association (RTAA) goal is celebrating the achievements of Deaf and Hard of Hearing students and alumni. They hope to connect students with alumni in the hopes of creating a long lasting network.

**Emerging & Innovative Projects**
Charitable Ventures of Orange County started the year with 47 employees and ended the year with 89 employees. This growth in employees demonstrates the additional services our projects are providing into our communities and the people needed to fulfill them. With the help of fiscal sponsorship and incubation, our projects can continue to serve Orange County.
Thank you to Our Funders 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 2017 as well as the more than 200 individual donors who contributed to our projects.

**Funders**

Aetna, Inc.
Aireps, Inc.
Al Garcia’s Plumbing, Inc.
Anaheim Ducks Hockey Club, LLC
Anaheim Small Business Organization
Angels Baseball Foundation
Anthem Foundation, Inc.
Aramark Sports & Entertainment Services
Argyros Family Foundation
Asian Americans Advancing Justice Los Angeles
Bank of America Corporation
Bend the Arc A Jewish Partnership for Justice
Blue Shield of California Foundation
Brookfield Los Angeles Builders, Inc.
CA Partnership to End Domestic Violence
California Arts Council
California Conference for Equality and Justice
California State University Fullerton Philanthropic Fdn
California United Bank
CalOptima
Care Ambulance Service, Inc.
Center for a New California
Change a Life Foundation
Chapman University
City of Anaheim Public Utilities Department
City of Santa Ana
Cox Communications, Inc.
Disney Worldwide Services, Inc.
FEI Marketing, Inc.
Fieldstead & Company
Fresno Building Healthy Communities
Frisbie Management, Inc.
Global Experience Specialists
Hoag Memorial Hospital Presbyterian
Immigrant Legal Resource Center
Irvine Health Foundation
Jean Perkins Foundation
Kaiser Permanente
Liberty Hill Foundation
LTG Platinum, LLC
Lyon-Integral Anaheim, LLC
Madison Park Neighborhood Association
Marisa Foundation
Mobilize the Immigrant Vote (MIV)
Movement Strategy Center
MUFG Union Bank, N.A.
National Association of Latino Arts & Cultures
National Day Laborer Organizing Network
Nederlander Grove, LLC
Nicholas Endowment
One OC
Opus Community Foundation
Orange County Community Foundation
Orange County Department of Education
Orange County’s United Way
Pacific Century Custom Service
Pacific West Association of Realtors
Pacific Western Bank
PIMCO Foundation
Planned Parenthood of Orange & San Bernardino
Public Law Center
R. D. Olson Development
Rancho Santiago Community College District
Red Oak Investments, LLC
River Church
Robert Wood Johnson Fdn
Rockwell and Marna Schnabel Foundation
Rutan & Tucker, LLP
SC Fuels
SLF-AREP IV South Street, LLC
SLF-HB Magnolia, LLC
St. Joseph Heath
St. Joseph Heath Community Partnership Fund
St. Joseph Heritage Healthcare
Sue & Bill Gross School of Nursing, UC Irvine
Susan G. Komen Orange County
Tait Environmental Services, Inc.
Tarsadia Foundation
Tenet Healthcare
Tides Center
The Allergan Foundation
The Allstate Foundation
The Annenberg Foundation
The Benevity Community Impact Fund
The California Wellness Foundation
The California Endowment
The Cashion Foundation
The Cirila Fund
The CorMura Foundation
The Dorothy Cate and Thomas F. Frist Foundation
The Fran & Ray Stark Foundation
The Francesca Ronnie Primus Foundation, Inc
The James Irvine Foundation
The Merage Institute
The San Francisco Foundation
UCI Initiative to End Family Violence
Ueberroth Family Foundation
UTP Productions
Weingart Foundation
Wells Fargo Foundation
Areas of Impact

Social Justice - Education - Children & Families - Community - Health

Individual Donors

Marti Baker
Richard Barrett
Red Barris
John Benner
Kathryn Berkowitz
Robert Bloomingdale
G.E. von Bolshwing
Susan Brown
Steven K. Buster
Daniel Campos
Irving and Nancy Chase
Barbara Corbett
Eric Daar
Nancy Dahan
John Davies
S.K. Dickson
Paul Durand
Hirad Emadi
Anthony Fanticola
William Feeney
Annette Fineberg
Stephen K. Fowlkes
Scott Fraser
Christopher T. Gaarder
James Gardner
Pamela Gilmour
Jay Gooding
Louise Haskett
Barbara Jean Heffernan
Basel Herbly
Nydia F. and Manuel Hernandez
Julie Hill
Kathleen Hutton
Janet Jones

Michelle Jordan
Nancy Kathleen
Marla Kaufman
Sarah Kiani
Michael Kim
Gigi Kroll
Dave Leary
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Thomas H. Lile
Raquel Lomeli
Noel Lucky
William H. Lyon
Dina Marciano
Barbara Meserve
Lorena Ramirez Moreno
Ridaa Murad
Mark Towfiq Carol Nakahara
Leslie Oberschmidt
Igor Olenicoff
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Debora Rodriguez
Pam Roy
Dena A. Rubin
Suzanne Sandoval
Eric Scandrett
Laurie Seidler
Catherine and Mac Shattuck
K. Siminou
Allyson M. Sonenshine
Suzanne and Latham Williams
Ray Wirta
Michael Wong
John Wyson
Betty Youndt
Peter & Quing Zeughauser

Kathleen Taylor
Cory and Susan Mcilwain Thabit
Mary Tuncer
Richard & Suzanne Wagner
Lili Wan
Stewart Webb
Robert Weir
David Welch
Rebecca Welch
Laura Welling
Mitchell and Jill Wexer
Suzanne and Latham Williams
Ray Wirta
Michael Wong
John Wyson
Betty Youndt
Peter & Quing Zeughauser