

Coaching Collective Impact Fiscal
Development Collaboration Program
Consulting Fiscal Sponsorship Incub
Coordination Consulting Program
Sponsorship Technical Assistance Coach
Development Coaching Innovation
Collective Impact Incubation Coordi
tion Program Development Fisca
cubation Coordination Consultin
ive Impact Innovation Technical

Innovate



**CHARITABLE
VENTURES**

A Center for Social Change

2020 Annual Report

A LETTER FROM THE CEO



In 2019, Charitable Ventures embarked on a new and dynamic journey, merging with a regional consulting firm to greatly expand its mission and services. As we headed into 2020, we had big plans for growth and change, to live up to our goal of being a true center for social change in the region.

In March 2020, Charitable Ventures, like the rest of the world, woke up to a global pandemic, sent all staff home to work remotely, and began the process of figuring out how to achieve our mission in a new, difficult environment.

The good news is that we did. The pandemic and the recession that quickly followed gave Charitable Ventures a new opportunity to serve – through the distribution of \$17.9M in rapid relief funding and small business grants.

We continued to provide practical and innovative consulting services to our nonprofit and foundation clients, and comprehensive nonprofit management services to the 39 sponsored projects on our platform. As we look ahead, our vision for growth over the next five years will be guided by the following objectives: To deepen our engagement in communities, to expand our services to meet the needs of more foundations, nonprofits, businesses and public agencies, and to pursue innovative collaborations to achieve social impact.

I am thankful for the leadership and staff at Charitable Ventures along with our network of dedicated philanthropic partners. Together, we worked hard to bring the resources, thought leadership, services and trainings to strengthen regional nonprofits and foundations during a dynamic 2020 calendar year.

Anne Olin
President & CEO

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MISSION

At Charitable Ventures, we work with all stakeholders to **strengthen communities and address critical social issues by:**

- Supporting collaborative efforts
- Incubating new ideas and supporting community projects
- Providing practical and innovative consulting to nonprofits and foundations

OUR VISION

Empowered communities, working together, solving critical social challenges

WHAT WE DO



INCUBATION/FISCAL SPONSORSHIP:

We incubate innovative projects and initiatives that bring new ideas to the social sector, and change into our communities.



SOCIAL IMPACT CONSULTING:

We provide practical and innovative consulting to nonprofits and foundations to build stronger, more effective programs to address pressing community challenges.



COLLECTIVE IMPACT:

We support regional collaboratives to help align efforts, resources, and strategies to effect change.



GRANTMAKING: We work with both public and private partners to distribute funding to community-based organizations, small businesses and efforts.



2020 COMMUNITY IMPACT HIGHLIGHTS

\$23.3M*

FUNDS RAISED FOR SOCIAL CHANGE



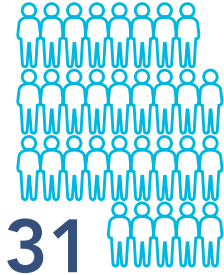
7

COVID-19 RELIEF FUNDS LAUNCHED AND ADMINISTERED



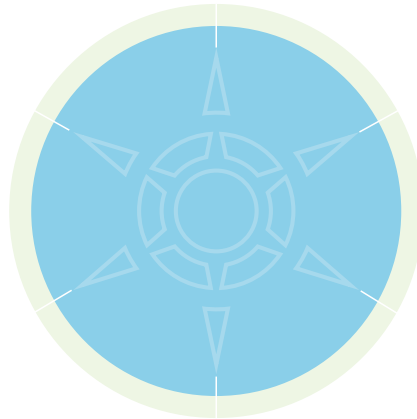
100+

COMMUNITY-BASED ORGANIZATIONS ENGAGED IN THE 2020 CENSUS



31

NONPROFITS RECEIVED SOCIAL IMPACT CONSULTING SERVICES



20,000+

INDIVIDUALS SUPPORTED FROM COMMUNITY INITIATIVES AND SOCIAL IMPACT INVESTMENTS

39



SOCIAL ENTERPRISES RECEIVED FISCAL SPONSORSHIP & INCUBATION SERVICES

**Not including COVID-19 relief funds.*

OUR PARTNERS

Foundations & Donors

We help foundations and donors respond to changing community needs and invest effectively to achieve greater impact.

Social Changemakers

We help community leaders and social entrepreneurs bring innovative ideas to the market of social services – and build business plans that work.

Nonprofits

We help strengthen nonprofits by building comprehensive programs, planning for the future, and advocating for critical community issues.

Public Agencies

We help publicly-funded agencies effectively deploy resources and manage community initiatives to improve and advance social infrastructures.

2020 CENSUS

In April 2019, Charitable Ventures was asked to facilitate the 2020 Census education and outreach efforts on behalf of Orange County's nonprofit sector. Charitable Ventures partnered with more than 100 local community-based organizations to help reach Hard-to-Count populations for a fair and accurate count in the region.



\$1.02M

FROM 13 PRIVATE FOUNDATIONS



\$2.9M

ADMINISTERED FUNDS FROM THE STATE



76.6%

SELF-RESPONSE RATE



The 2020 Census was unprecedented in the challenges faced by communities across the nation, from inadequate funding at the federal level, to launching at the same time that the global COVID-19 pandemic was announced, to political suppression of an accurate count. The challenges in Orange County were no different, and Charitable Ventures, as the State-contracted Regional Administrative Community-Based Organization (ACBO) for Orange County, was in the mix through the entire 2020 campaign.

Charitable Ventures formed close partnerships with the County of Orange, the OC Department of Education, several Local Complete Count Committees, the U.S. Census Bureau, and First 5 Orange County to align Census efforts. Through regranting, organizing, training, media outreach, digital strategies and capacity building, Charitable Ventures was at the center of the region's effort to count every resident.



The 18+ month effort paid off – Orange County achieved a 76.6% Self-Response Rate despite myriad challenges, well above the 2010 Self-Response Rate of 71.7%.

We attribute 2020's success to the collaborative effort that pulled Orange County actors from all sectors to focus on Census outreach and response; it was truly a moment of collective impact. We are thankful for the investments from the California Census Office and our 13 OC Census Fund funders, without which this work would have looked quite different.

RESPONDING TO COVID-19

OC COMMUNITY Resilience Fund

Powered by
Charitable Ventures, OC Grantmakers, Orange County Community Foundation and St. Joseph Community Partnership Fund

Charitable Ventures served as the administrator for the OC Community Resilience Fund, processing over 400 applications and helping deploy emergency grants to nonprofits serving highly vulnerable individuals impacted by COVID-19. Over the course of two months, OCCRF raised and distributed \$4.7M to 171 organizations, thanks to the generosity of 43 foundations and 200+ individual donors.



“Your support was critical to our ability to safely design and implement several special programs to meet the changing needs of our families during the pandemic.”

– Elizabeth Beas
Director of Development
Boys & Girls Club of the South Coast Area

Through December 2020, 100% of grantees were still operating!



In addition to the OCCRF, Charitable Ventures managed and facilitated the following six community relief funds:

- City of Santa Ana CARES Act Fund
- City of Santa Ana COVID-19 Arts Relief Program
- District 3 COVID-19 Arts Relief Program
- In'Lakesh Relief Fund
- OC Arts and Culture Resilience Fund
- OC COVID-19 Childcare Relief Program



\$17.9M

TOTAL RELIEF FUNDS
DISTRIBUTED IN 2020



242

SMALL BUSINESSES THAT
RECEIVED RELIEF GRANTS



976

NONPROFIT ORGANIZATIONS
THAT RECEIVED RELIEF GRANTS

PROJECT HIGHLIGHTS



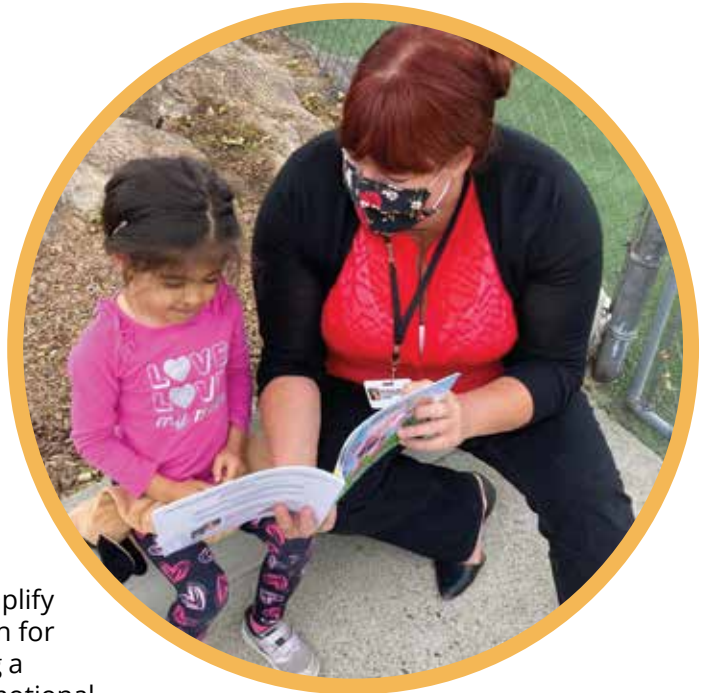
C.R.E.C.E. Urban Farms

C.R.E.C.E. Urban Farms is a cooperatively-run project committed to empowering Santa Ana through education and shared knowledge to address food disparities. C.R.E.C.E. serves the working families in the community by providing access to green space for education and hands-on experience with a focus on holistic solutions to health and food sustainability practices. Charitable Ventures helps to develop C.R.E.C.E. through financial training, providing legal support for new community contracts and finding unique funding opportunities that support food equity and sustainability.



Start Well

Start Well is dedicated to connecting early childhood education providers to early intervention and mental health systems to educate, reduce stigma, and connect services for families to effectively address the social-emotional skills of young children, from birth to age eight. Charitable Ventures' fiscal sponsorship platform provides contract management expertise to mobilize collaborative relationships with public agencies to further amplify their work throughout the county with the vision for families to be skilled and competent in providing a nurturing environment focused on social and emotional well-being and behavioral health of all children.



“ *It's been my great honor to be a part of the Start Well project! Thanks to Charitable Ventures' fiscal sponsorship we are able to serve our Early Childhood Educators to build capacity to effectively work with children with challenging behaviors and other mental health concerns throughout Orange County.* ”

– Sadhna Matai, MS Psy
Start Well Program Manager



Santa Ana Active Streets

Founded in 2013 and joining the Charitable Ventures platform in 2019, Santa Ana Active Streets (SAAS) seeks to empower residents to become engaged in the active transportation movement in Santa Ana by organizing community activities to support safe and healthy transportation initiatives with inventive programming. With the support of Charitable Ventures in grant management and back office infrastructure, The Active Transportation Leadership Program and the Central Santa Ana Complete Streets Plan were developed to identify challenges and advocate for active transportation policies.



STEM Funders Network

The STEM Funders Network was founded in 2012 and provides member foundations and businesses that are engaged in STEM-related educational investments with the framework and support needed to learn from one another and collaborate for greater impact by leveraging resources, ideas, and leadership. Charitable Ventures provides superior fiscal management systems to the project so the Network can inspire and prepare all youth to engage in science, mathematics, technology, and engineering through equity, access, and opportunity, now and in the future.



SUPPORTED SPONSORED PROJECTS IN 2020

2020 Census
360 Turnaround Youth Diversion Program
California Network of Family Strengthening Networks
Circulos
Cooperacion Santa Ana
C.R.E.C.E.
Early Childhood OC
Families and Communities Together (FaCT)
Hispanic Education Endowment Fund
HOA Community Reinvestment Fund
Hub for Integration, Reentry & Employment (HIRE)
Independence Service Dogs Foundation
Jewish Addiction Awareness Network
Kathi Koll Foundation
Madison Park Neighborhood Association
OC Adult Day Services Coalition
OC Nonprofit Professionals Network
OC World
OCI Education Center
Orange County Deaf Literacy Project
Orange County Grantmakers
Orange County Women's Health Project
Oscar & Ma
Project Kinship
Raising Teens Foundation
Real Leaders
Resilience OC
Roadrunner Trojan Alumni Association
San Gorgonio Outdoor Science School
Santa Ana Active Streets
Santa Ana Building Healthy Communities
Santa Ana Early Learning Initiative (SAELI)
Santa Ana Grants for Blocks
SIEMBRAS
South Laguna Community Garden Park
Start Well
STEM Funders Network
The Mix Academy
The Praxis Lab

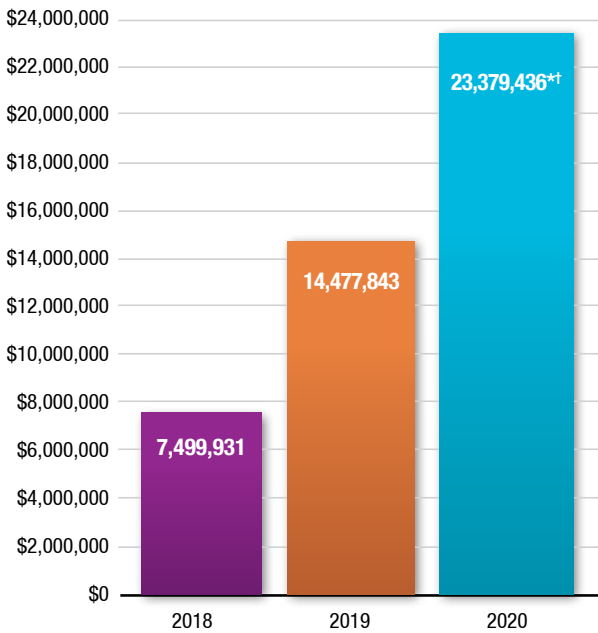
SUPPORTED CLIENTS

Charitable Ventures is proud to have provided social impact consulting services to the following nonprofits and foundations in 2020:

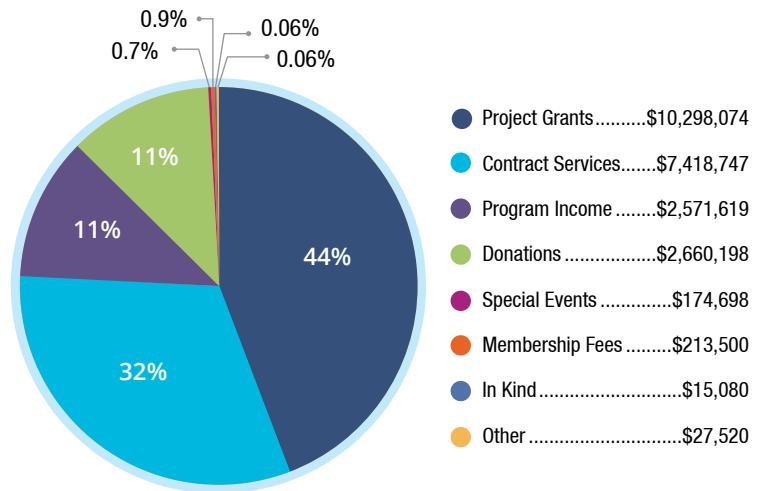
211 Orange County
American Academy of Pediatrics - OC
American Career College Educational Fund
Archstone Foundation
Boys & Girls Clubs of Central Orange Coast
California Mental Health Services Authority
Casa Teresa
Community Legal Aid SoCal
Cooper Housing Initiative
Discovery Science Foundation
Family Assistance Ministries
Families and Communities Together (FaCT)
First 5 Orange County, Children and Families Commission
Guardian Heals
High School, Inc.
Hope Center for the Arts
Mariposa Women & Family Center
Northeast of the Well
Orange County Community Foundation
Orange County Grantmakers
Orange County Shared Spaces
Orange County Women's Health Project
Pathways to Independence
SeniorServ (Meals on Wheels Orange County)
Start Well
St. Joseph Health Northern California
St. Joseph Community Partnership Fund
The Cambodian Family
UC Irvine, School of Medicine

FINANCIALS

Funds Raised: 2018-2020



Revenue by Type, 2020



*2020 unaudited numbers, \$2,200,251 deferred for 2021 usage.

†Not including COVID-19 relief funds.

BOARD OF DIRECTORS

John L. Benner (Chair)

*Coach, Executive Coaches of Orange County
Retired Business Executive*

John (Jake) C. Rohrer (Treasurer)

*Coach, Executive Service Corps, Los Angeles Chapter
Retired Business Executive, Former Member of Hoag Hospital Foundation Board*

Dr. Jerome Hunter

*Retired Chancellor
North Orange County Community College District*

Shawna Smith

*Chief Executive Officer
Hope Builders*

Jason Lacsamana

*Director, Programs and Partnerships
St. Joseph Community Partnership Fund*

Keith Swayne

*Founder
Keith and Judy Swayne Foundation Fund*

Edson McClellan

*Partner
Rutan & Tucker, LLP*

Anne Olin

*Ex Officio
President & CEO, Charitable Ventures*

FUNDERS

A Little Help Foundation Fund
Abelard Foundation, a partner of Common Counsel Foundation
Alpert & Alpert Foundation
Anaheim Community Foundation
Arnold and Mabel Beckman Foundation
Asian American Futures
Audrey and Martin Gruss Foundation
Barney & Barney Foundation
BJ's Restaurant Foundation, Inc.
Block Family Foundation Fund
Blue Shield of California Foundation
C.E. and S. Foundation, Inc.
Caring Path Foundation Fund
Cheeky Monkey Foundation Fund
Columbia Tough Mother Funder of Oregon Community Foundation
Connelly Family Foundation
Draper Family Foundation
Edwards Lifesciences Foundation
Fluor Foundation
Holloway Family Foundation
Homestreet Foundation
Hosan Foundation
Irvine Health Foundation
Jack Schwartzman Family Foundation

Jennie V. Foundation
Jewish Community Foundation Los Angeles
Jewish Community Foundation of Orange County
Joseph F. Stein Family Foundation, Inc.
JP Morgan Chase Foundation
Justin Dart Family Foundation
Kathy Simon Family Foundation
Keith and Judy Swayne Foundation Fund
Luevano Foundation
Miracle Foundation Fund
MUFG Union Bank Foundation
Nancy and Geoffrey Stack Family Foundation
National Christian Foundation
Nordson Corporation Foundation
Oklahoma City Community Foundation
Opus Community Foundation
Orange County Community Foundation
Pacific Life Foundation
PIMCO Foundation
Prewoznik Foundation
Renaissance Charitable Foundation
Returning Home Foundation
Robert and Tracy Williams Family Foundation
Samueli Foundation

Simon Foundation for Education and Housing
Sisters of St. Joseph Healthcare Foundation
St. Joseph Health System Foundation
Stone Family Foundation Fund
Sun Family Foundation
Taco Bell Foundation
Tarsadia Foundation
The Allergan Foundation
The Beall Family Foundation
The California Endowment
The California Wellness Foundation
The Center at Sierra Health Foundation
The Charitable Foundation of The Burns Family, Inc.
The First Foundation
The Fran & Ray Stark Foundation
The Fritz and Mary Lee Duda Family Foundation
The James Irvine Foundation
The John L. Cashion Family Foundation
The Larry and Helen Hoag Foundation
Ueberroth Family Foundation
UHL & KK Foundation
Weingart Foundation
Wells Fargo Foundation



LEADERSHIP

Anne Olin, President & Chief Executive Officer
Ted Kim, Chief Financial Officer
Paul Bonfanti, Director of Client Services
Amy Klein, Director of Programs & Development
Jennifer Medina, Director of Human Resources
Jin Sim, Director of Finance

WITH THANKS

A special thank you to our 800+ donors who supported our projects and mission in 2020. You made our social impact work possible.

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Sponsorship Technical Assistance Coach
Development Coaching Innovation
Collective Impact Incubation Coordi
tion Program Development Fisca
Incubation Coordination Consultin
Collective Impact Innovation Technical



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