

CIVIC 50

Orange County

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Editor's Note: The First Local Civic 50

Since 2012, The Civic 50, an initiative of **Points of Light**, has recognized the 50 most community-minded major corporations in the nation each year as determined by a survey developed by **True Impact**. For the first time in a local market, the Orange County Business Journal presents the 2017 Civic 50 Orange County in partnership with **OneOC**, recognizing the 50 most community-minded small, medium, and large Orange County companies.

Mounting research proves why community-minded companies are doing well by doing good. Socially responsible companies have a measurable business lift in consumer preferences, company reputation, and employee attraction and retention. Community engagement isn't now just for large companies; small and medium-size companies also feel increased expectations to be more strategic in their philanthropy and to empower employees to give time, talent and money. And millennials are now dominating the new workforce with high expectations of employers.

Find a company that's got higher-than-average employee retention and scores well in those "Best Places to Work" surveys, and chances are you'll find a company where local philanthropy and community-service programs are not only in place, but a well-known component of the culture. We surely found that to be true in our inaugural survey. We think you'll be impressed with the extent of civic engagement in our OC community, the creativity—almost always with the ground-up engagement—and the number of resources committed.

The Civic 50 honorees excelled at integrating their community programs into key business functions, such as employee engagement, recruitment, marketing and public relations. For example, Irvine's **Edwards Lifesciences'** Talent Development Program, which recruits college-age interns and recent college graduates for entry-level jobs, includes volunteerism as a key part of the orientation process, helping them see the values of Edwards as a company while strengthening the community and offering a team-building opportunity. It's just one way Civic 50 honorees showed that companies can "do well by doing good."

Civic 50 Orange County assessed what and how local companies performed on an independently administered and scored online survey that measured four dimensions of community engagement: **Investment**—how extensively and strategically the company applies resources, including employee time and skills, cash, in-kind giving and public leadership; **Integration**—how a company's programs support business interests and integrate into business functions; **Institutionalization**—how the company supports community engagement through policies and incentives; and **Impact**—how the company measures social and business outputs and outcomes.

Not all local companies have the same level of resources or engagement in all of the activities the survey measures. Therefore, scoring and awards were based on the number of local employees: small 15-99; midsize 100-499; and large 500 and up, and similarly sized companies were measured within their peer groups and compared only on community engagement programs in Orange County.

The story that accompanies The List of this year's 50 honorees details some of the metrics



It Takes a Bank: BofA's OC employees lend some hands to Neighborhood Builders

used to measure the companies. What follows are stories of those companies and their employees engaging in our community. By benchmarking and celebrating the leading practices of Civic 50 Orange County honorees, the Business Journal and OneOC hope to provide inspiration and a framework for other companies to build and grow social initiatives to create a stronger, healthier and more vibrant Orange County.

— Daniel McQuaid and Pete Weitzner
OneOC President & CEO
Editor, Orange County Business Journal



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— Charles Antis, founder and CEO of Antis Roofing and Waterproofing.

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— Reid Ribble, CEO of National Roofing Contractors Association.

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We believe in innovation, inspiration, and impact. We believe in taking action to create lasting change and we believe in the power of service. For all these reasons and more, we believe in **the purpose of the Civic 50 and salute all the honorees.**

Keep up the important work, change-makers.

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THE LIST CIVIC 50: LARGE COMPANIES










▶ NEXT WEEK'S LIST *Fastest-Growing Public Companies*

Company •Address	Company logo	•OC employees •Companywide employees	Company/product description	Primary OC nonprofit/community initiatives	Top local official(s) •Title •Phone/fax
American Advisors Group 3800 W. Chapman Ave. Orange 92868-1638 Headquarters: Orange Website: americanadvisorsgroup.com		•869 •1,275	Reverse mortgage lending	AAG Foundation, Meals on Wheels; hosts events at the Orange Senior Center; The Emergency Assistance Food Program; card writing; AAG employee receives eight hours of volunteer time off	Reza Jahangiri (888) 998-3147
Arbonne International LLC 9400 Jeronimo Road Irvine 92618-1907 Headquarters: Irvine Website: arbonne.com		•318 •832	Health, beauty products	Arbonne Charitable Foundation supports the development of confidence and self-esteem in teenage girls and boys; Orangewood Foundation, Girls Inc. of Orange County, Working Wardrobes, Junior Achievement, Global G.L.O.W., and etc.	Kay Zanotti CEO (949) 770-2610/(949) 460-1095
Bank of America Corp. 520 Newport Center Drive, Ste. 1100 Newport Beach 92660-7038 Headquarters: Charlotte, N.C. Website: bankofamerica.com		•4,800 •208,000	Bank	Neighborhood Builders, addresses needs related to community development, workforce development and education, and basic needs; Student Leaders, engages high school students through a paid internship at an Orange County nonprofit organization; Better Money Habits, free online education resource	Allen Staff Orange County market president (949) 287-0669/(213) 457-2428
Beckman Coulter Inc. 250 S. Kraemer Blvd. Brea 92821-6232 Headquarters: Brea Website: beckmancoulter.com		•1,000 •12,000	Medical testing, research products	Grants program, volunteer events program, volunteer event matching gifts, volunteer time-off program	Christopher Riley president, Beckman Coulter Diagnostics (714) 993-5321/(800) 232-3828
Capital Group 6455 Irvine Center Drive Irvine 92618-4518 Headquarters: Los Angeles Website: capitalgroup.com		•2,200 •7,500	Financial services company	2 for 1 matching gifts program; Community Action Days, 20-50 associates during the work day partner with a nonprofit; Heninger Elementary School in Santa Ana, supports adopt-a-school program; Anniversary Program, every five years associates can provide a grant to an organization of their choosing	Diane Sawyer president, American Funds Service Company (800) 421-8511
Cox Communications Inc. 27121 Towne Centre Drive, Ste. 125 Foothill Ranch 92610-2825 Headquarters: Atlanta Website: cox.com		•538 •18,598	Broadband communications and entertainment company	Connect2Compete, offers affordable Internet to qualifying families; Innovation in Education, grants are open to K-12 schools within the Cox Orange County service area; Cox Charities, funded by employee donations and matched by the company	Jodi Duva VP, Cox Business (949) 563-8285
Deloitte LLP 695 Town Center Drive, Ste. 1000 Costa Mesa 92626-1924 Headquarters: New York Website: deloitte.com		•857 •263,900	Provides audit and assurance, consulting, risk and financial advisory, risk management, tax, and related services	Helps veterans overcome legal barriers to integrate them into society through Veterans Legal Institute, educates youth at Taller San Jose, serves additional nonprofit boards; Impact Day (Deloitte's annual day of service)	Tim Brandt managing partner, OC practice (714) 436-7367/(714) 424-1431
Disneyland Resort 1313 S. Harbor Blvd. Anaheim 92802-2309 Headquarters: Burbank Website: disneyland.disney.go.com		•29,000 •145,000	Entertainment company, owned and operated by Burbank-based The Walt Disney Co.	Accelerate Change Together (ACT) Anaheim; Disney Wish Program; hosts the Annual CHOC Walk in the Park fundraiser for CHOC Children's Hospital; programs in music education for local schools; Disney VoluntEARS; support nonprofits through board service, Dreamers and Doers, Happiest Class on Earth, and etc.	Michael Colglazier president, Disneyland Resort (714) 781-4636
Edwards Lifesciences Corp. One Edwards Way Irvine 92614-5688 Headquarters: Irvine Website: edwards.com		•4,329 •12,376	Medical device company	Partners with nonprofit organizations in Orange County through grants from Edwards Lifesciences Foundation, leadership involvement on boards, employee volunteerism and other donations (blood, toys, clothes, etc.)	Michael A. Mussallem chairman/CEO (949) 250-2500/(949) 250-2525
Kaiser Permanente 3460 E. La Palma Ave. Anaheim 92806-2020 Headquarters: Oakland Website: kp.org/orangecounty		•7,800 •192,607	Integrated managed care consortium	HEAL Zone, promotes Healthy Eating and Active Eating; works with the Orange County Community Coalition to improve the system of care for mental health; food recovery/redistribution of surplus wholesome food from Anaheim and Irvine cafeterias; organizes food drives and provides maps of food pantries	Mark Costa senior VP, area manager (714) 644-4100/(714) 644-4114
Pacific Dental Services 17000 Red Hill Ave. Irvine 92614-5626 Headquarters: Irvine Website: pacificdentalservices.com		•1,067 •9,000	Dental business support organization	Charities include Blind Children's Learning Center, Second Harvest Foodbank, OC Rescue Mission, Mary's Kitchen, Boys and Girls Club of Santa Ana, The Back Bay Therapeutic Horse Riding Club, Kidworks, Operation Refugee, Ronald McDonald House; supports Special Olympics OC and Make-A-Wish	Stephen E. Thorne IV founder/CEO/president (714) 845-8500/(949) 250-0510
Pacific Life Insurance Co. 700 Newport Center Drive Newport Beach 92660-6397 Headquarters: Newport Beach Website: pacificlife.com		•2,073 •3,387	Life insurance, annuities, investments, mutual funds, aircraft leasing, reinsurance	KaBOOM! Playground Builds, United Way Campaign, marine mammal conservation, K-12 educational grants, "Good Guys" community service employee volunteers	James T. Morris chairman/CEO/president (949) 219-3011/(949) 219-8772
Pacific Investment Management Co. (PIMCO) 650 Newport Center Drive Newport Beach 92660-6424 Headquarters: Newport Beach Website: pimco.com		•1,000 •2,200	Fixed investment managers	PIMCO Foundation partners with the OC Food Bank to pack food boxes (800 employees, families and friends packed 12,000 boxes for about 48,000 individuals across Orange County, last year); Global Week of Volunteering, firm participates in more than 100 events worldwide, about 35 events taking place in Orange County; PIMCO Pro Bono Corps	Emmanuel Roman CEO (949) 720-6000
St. Joseph Health 3345 Michelson Drive, Ste. 100 Irvine 92612-0693 Headquarters: Irvine Website: stjhs.org		•1,000 •111,000	Integrated health care delivery system	Contributes 17% of its total revenue to charity and community programs; each hospital within the St. Joseph Health system contributes 10% of net income to the Community Partnership Fund; Care for the Poor program; wellness centers	Annette Walker president of strategy, Providence St. Joseph Health/CEO, St. Joseph Health (949) 381-4000
MUFG Union Bank 18300 Von Karman Ave., Ste. 200 Irvine 92612-1046 Headquarters: Tokyo Website: unionbank.com		•808 •5,000	Bank	Habitat for Humanity (Union Bank employees helped build a house for a veteran family and the Union Bank Foundation provided Habitat for Humanity with a multi-year grant); Anaheim Unified High School District; American Heart Association	Robbin Narike Preciado regional president (714) 565-5561
Wells Fargo & Co. 2030 Main St., Ste. 1100 Irvine 92614-7255 Headquarters: San Francisco Website: wells Fargo.com		•4,000 •270,000	Bank	Illumination Foundation, American Family Housing, Taller San Jose, Kennedy Commission, Orange County Hispanic Chamber	Keith Kobata Orange County Region Bank president (949) 251-4455
Western Digital Corp. 3355 Michelson Drive, Ste. 100 Irvine 92612-5694 Headquarters: San Jose Website: wdc.com		•1,474 •73,185	Maker of memory products	The Western Digital Foundation focuses on equal access to education, science, technology, engineering, and mathematics (STEM), for underserved and underrepresented youth; world hunger; preserving the environment; and support for veterans and their families	Stephen Milligan CEO (949) 672-7000

Source: Santa Ana-based OneOC and the companies
Abbreviations: wnd: would not disclose
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THE LIST CIVIC 50: MEDIUM COMPANIES

▶ NEXT WEEK'S LIST *Fastest-Growing Public Companies*

Company •Address	Company logo	•OC employees •Companywide employees	Company/product description	Primary OC nonprofit/community initiatives	Top local official(s) •Title •Phone/fax
Ambry Genetics Corp. ⁽¹⁾ 15 Argonaut Aliso Viejo 92656-1423 Headquarters: Aliso Viejo Website: ambrygen.com		•482 •665	Genetic testing solutions for inherited and non-inherited diseases	Mauli Ola Foundation, Stand up for the Cure, Epilepsy Awareness Day at Disneyland, Susan G. Komen, American Cancer Society, American Heart Association, Global Genes, Fight Colorectal Cancer, Children's Hospital of Orange County, and etc.	Charles L.M. Dunlop/Aaron Elliott chairman, president/CEO (949) 900-5500/(949) 900-5501
City National Bank 18111 Von Karman Ave., Ste. 120 Irvine 92612-7121 Headquarters: Los Angeles Website: cnb.com		•137 •4,000	Bank	Educational outreach to schools through the bank's Reading is The Way Up® literacy program; food drives; housing; veterans	Robert Iritani executive VP/Orange County regional executive (949) 223-4019/(949) 223-4030
Companion Home Health and Hospice Headquarters: wnd Website: companionhealthgroup.com		•175 •wnd	Healthcare organization	Southern California Hospice Foundation (SCHF)	wnd (877) 570-6676/(714) 560-8175
Cummins Pacific Region 1939 Deere Ave. Irvine 92606-4818 Headquarters: Columbus, Ind. Website: cummins.com		•140 •wnd	Designs, manufactures, sells and services diesel and alternative fuel engines	Paid volunteer time, formal community involvement teams, monthly reporting of key metrics, monthly communication of engagement and impact, leadership engagement and support; hosted a blood drive with the American Red Cross	Tom Linebarger chairman/CEO (800) 746-5757/(949) 253-0921
Donahue Schriber 200 E. Baker St., Ste. 100 Costa Mesa 92626-4551 Headquarters: Costa Mesa Website: donahueschriber.com		•99 •124	REIT (Real Estate Investment Trust)	OC Real Estate Luncheon benefiting OC Veterans; California Showcase- Opportunity through Football; CSUF Guardian Scholars Program	Patrick S. Donahue/Lawrence P. Casey chairman, CEO/president, COO (714) 545-1400/(714) 545-4222
DPR Construction 4665 MacArthur Court, Ste. 100 Newport Beach 92660-2056 Headquarters: Redwood City Website: dpr.com		•200 •2,580	Commercial construction company	Four pillars include: career guidance and mentorship, facility repair and renovation, operational support of nonprofits, inspiring youth to pursue careers in STEM; main partners in OC are Girls Inc., KidWorks, Playworks, and etc.	Abel Gonzalez/Michael Konetzke business unit leaders (949) 955-3771/(949) 253-0015
Ernst & Young LLP 18101 Von Karman Ave., Ste. 1700 Irvine 92612-1007 Headquarters: London Website: ey.com		•436 •231,000	Assurance, tax, transaction and advisory services	EY Connect Day- employees nationwide are given the day off to volunteer in their communities; nonprofit organizations include Boys & Girls Clubs of Tustin, Orange County United Way, Second Harvest Food Bank of Orange County and Habitat for Humanity of Orange County	Kim Letch office managing partner (949) 437-0244/(866) 500-1087
Fluidmaster Inc. 30800 Rancho Viejo Road San Juan Capistrano 92675-1564 Headquarters: San Juan Capistrano Website: fluidmaster.com		•130 •2,000	Toilet system components, repair and related products	Major sponsors of Habitat For Humanity, Relay For Life, Boys & Girls Club, and Boy Scouts of America, among others	Robert Anderson/Schoepe/Todd Talbot chairman, CEO/president (949) 728-2000
Gensler Newport Beach 4675 MacArthur Court, Ste. 100 Newport Beach 92660-8811 Headquarters: San Francisco Website: gensler.com		•100 •5,466	Architecture firm	Ace Mentor Program, We Care, Discovery Arts, STEM Program, Container Village	Kim Graham/Chip Williams regional managing principal/ managing director (949) 863-9434/(949) 553-1676

Source: Santa Ana-based OneOC and the companies
Abbreviations: wnd: would not disclose
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⁽¹⁾ Aliso Viejo-based Ambry Genetics Corp. was sold to Tokyo-based Konica Minolta Inc.; the deal is expected to close by year-end

Researched by Dana Truong

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THE LIST CIVIC 50 COMPANIES



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MICHAEL COLGLAZIER
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Disneyland Resort
Legacy Company Award



ELIZABETH MCKEEN
Managing Partner
O'Melveny & Myers LLP
Small Company Award



ALLEN STAFF
Orange County Market President
Bank of America Corp.
Large Company Award

50 Honorees, 5 Awards in 1st Civic 50 Orange County

'Corporate Philanthropy Is in a Renaissance'

By PETE WEITZNER

The list in this Special Report is unusual for the Business Journal in two ways. It's a first—the first list of local-market Civic 50 honorees in the country. And it's likely a first Business Journal list without financials. Rightly so.

The list isn't ranked by Orange County companies' two-year sales growth, market cap or increase in local payrolls. It's simply alphabetical and segmented by number of Orange County employees: large 500-plus, medium 100 to 499, and small 15 to 99. The list details just some of the OC Civic 50s' charities and civic-engagement programs.

Points of Light, the world's largest organization dedicated to volunteer service, initiated the national Civic 50 in 2012, joined by **True Impact**—and **OneOC** for a regional survey. The survey does use metrics to provide benchmarks for companies to gauge themselves against national norms and to compare themselves with peers. The metrics include investment of employee time and skills, cash and in-kind contributions, and public voice devoted by firms



Inaugural Civic 50 Orange County honorees, presenters and sponsors

and their employees to serving their communities—which encompasses funding support for a company's most important Orange County social cause.

There are other quantitative measures, all factored into the scoring to determine the honorees and "award winners" that follow. The narratives and case studies that the 50 honorees and all survey respondents provided didn't factor into the scoring; they're "off balance-sheet items." But they tell a bigger story, of a "renaissance in corporate philanthropy" that's clearly evident in the Orange County Civic 50, even measured against U.S. Civic 50 honorees.

Consider:

■ Average volunteer hours/employees: OC Civic 50: 15.9, U.S. Civic 50: 5.3

■ Average percentage of employees who volunteer: OC Civic 50: 46, U.S. Civic 50: 26

■ Firms that offer employees paid volunteer time off: OC Civic 50: 74%, U.S. Civic 50: 64%

Ceremony Notables (and Quotables)

The inaugural Civic 50 culminated with an awards luncheon on Thursday at Hotel Irvine recognizing all 50 companies for generosity and servitude, with the following awards:

■ Small company group: **O'Melveny & Meyers LLP**

■ Medium company group: **KPMG LLP**

■ Large company group: **Bank of America**

■ Emerging company: **Antis Roofing & Waterproofing**

■ Legacy company: **Disneyland Resort**

Some luncheon inspiration:

"When we were starting, I walked into another company, and they were so happy. I thought they must be actors. But I listened to philanthropy leaders here, like **Dan McQuaid**. Now we have that culture." — **Charles Antis**

"We've got millennials, Gen X, Gen Y, boomers, and the Greatest Generation, all in this room and all focused on doing good." — **Lindsay Lawrence**, COO, **First Foundation Bank**, Civic 50 award presenter.

Overheard: "Can they make the survey shorter?"

"I'm working on it." — **Dan McQuaid**, CEO, **OneOC**

How Some Do It

Just a sampling of Civic 50 companies' approaches:

■ **Capital Group** celebrates associates' long-term contributions to the company by donating \$250 to the nonprofit of their choice on their five-year anniversaries; \$500 in their 10th and 15th years, and \$1,000 at the 20-year mark.

■ **Optima Group's** Fun & Culture Committee employs a "ground-up" approach where every department has a representative on a 12-member committee to select charities and design activities.

■ **Union Bank's** partnership with Anaheim Unified includes a student-run branch at Loara High with \$500 stipends for students and \$1,000 scholarships toward college upon completing a one-year senior course. ■



THE LIST CIVIC 50: MEDIUM COMPANIES

▶ NEXT WEEK'S LIST *Fastest-Growing Public Companies*

▶ from page 25

Company •Address	Company logo	•OC employees •Companywide employees	Company/product description	Primary OC nonprofit/community initiatives	Top local official(s) •Title •Phone/fax
KPMG LLP 20 Pacifica, Ste. 700 Irvine 92618-3391 Headquarters: New York Website: kpmg.com/us		•422 •31,066	Business solutions and audit, tax, and advisory services	KPMG's Family for Literacy (KFFL) program, combats childhood illiteracy by providing new books to children from low-income families in partnership with First Book; donated over 3 million new books to children in need across the U.S.	Mark Clemens office managing partner (949) 885-5400/(949) 885-5410
Mazda 200 Spectrum Center Drive Irvine 92618-5003 Headquarters: Hiroshima, Japan Website: mazdausa.com		•490 •wnd	Automotive distribution, marketing, design	Mazda Drive for Good	Masahiro Moro CEO/president (949) 727-1990
Optima Tax Relief LLC 3100 S. Harbor Blvd., Ste. 250 Santa Ana 92704-6874 Headquarters: Santa Ana Website: optimataxrelief.com		•451 •466	Tax resolution firm	Charity of the Month fundraising program, volunteer days (staff members can trade a day at work for serving in the community), Jeans Thursdays (employees donate money to charity to wear jeans), canned food drives, and talent competition for breast cancer awareness	Harry Langenberg managing partner (800) 536-0734
Opus Bank 19900 MacArthur Blvd., 12th floor Irvine 92612-8427 Headquarters: Irvine Website: opusbank.com		•327 •772	Bank	High School Inc., Boys & Girls Clubs of Central Orange Coast, KidWorks, The Wooden Floor, OC Funders, OC Community Relations Council, OC Opportunity Initiative, and etc.	Stephen H. Gordon chairman/CEO/president (949) 250-9800/(949) 250-9988
PricewaterhouseCoopers LLP 2020 Main St., Ste. 400 Irvine 92614-8227 Headquarters: New York Website: pwc.com		•398 •223,000	Professional services	Financial literacy, youth through adult education, and OC community outreach and support of all kinds, with donations of time, leadership and financial contribution	Ted Wilm office managing partner (949) 437-5450/(813) 329-2220
R.D. Olson Construction Inc. 2955 Main St., third floor Irvine 92614-2530 Headquarters: Irvine Website: rdolson.com		•115 •115	General contracting and construction management firm	Participates in Habitat for Humanity builds; annual golf tournament to benefit the Pediatric Cancer Research Foundation (PCRF); Boy's and Girl's Club of America, the annual OC Pride events, pro bono work for local schools and children's hospitals, American Heart Association, Olive Crest and the Boy Scouts of America	Bill Wilhelm president (949) 474-2001/(949) 474-1534
Rutan & Tucker LLP 611 Anton Blvd., Ste. 1400 Costa Mesa 92626-1931 Headquarters: Costa Mesa Website: rutan.com		•257 •277	Law firm	Attorneys on the boards of nonprofits, including Second Harvest Food Bank, OneOC, Boys & Girls Clubs, and etc.; supports the Orange County Bar Foundation's ShortStop program, SOS's Adopt A Family program and We Give Thanks Foundation	William F. Meehan managing partner (714) 641-5100/(714) 546-9035
Snell & Wilmer 600 Anton Blvd., Ste. 1400 Costa Mesa 92626-7689 Headquarters: Phoenix Website: swlaw.com		•100 •858	Law firm	Snell & Wilmer Charitable Foundation; attorneys worked nearly 2,500 pro bono hours in 2016; contributes to Orange County United Way through attorney and staff donations, firm contributions and a grant through the firm's charitable foundation	Ketan Vakil administrative partner (714) 427-7000/(714) 427-7799
Teacher Created Materials 5301 Oceanus Drive Huntington Beach 92649-1030 Headquarters: Huntington Beach Website: tcmpub.com		•98 •188	Educational publisher	Annual literacy-building and school beautification projects; hosts departmental competitions to bring in pasta and sauce to feed hungry children through Caterina's Club; supports schools that have been affected by natural disasters through replenishment of school materials and curriculum	Rachelle Cracchiolo/Corinne Burton/ Deanne Mendoza owners (714) 891-2273/(714) 230-7070

Source: Santa Ana-based OneOC and the companies
Abbreviations: wnd: would not disclose
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Researched by Dana Truong

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THE LIST CIVIC 50: SMALL COMPANIES

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Company •Address	Company logo	•OC employees •Companywide employees	Company/product description	Primary OC nonprofit/community initiatives	Top local official(s) •Title •Phone/fax
Advance Beauty College 10121 Westminster Ave. Garden Grove 92843-4752 Headquarters: Garden Grove Website: advancebeautycollege.com		•40 •40	Provides training in the beauty and wellness industry	California State University Fullerton Philanthropic Foundation, Orange Coast Memorial Foundation, Project Vietnam Foundation, Courageous Elementary School PTA, Fountain Valley School District, Girl's Inc., Yesenia's Dream Dress Drive, Harvard Business School Association of Orange County, and etc.	Tam Nguyen/Linh Nguyen president/VP (714) 530-2131
Aitken Aitken Cohn 3 MacArthur Place, Ste. 800 Santa Ana 92707-6076 Headquarters: Santa Ana Website: aitkenlaw.com		•25 •25	Law firm	Laura's House (supports domestic abuse victims), Public Law Center (free legal advice/representation for low-income households), and Ryan's Reach (supports traumatic brain injured survivors and their families); Race for the Cure, Salvation Army, and volunteers at the Kathleen and Jack E. Foley Special Olympics	Wylie Aitken founding partner (714) 434-1424/(714) 434-3600
Antis Roofing & Waterproofing 2649 Campus Drive Irvine 92612-1601 Headquarters: Irvine Website: antisroofing.com		•100 •100	Roofing, waterproofing, and decking services	Habitat for Humanity, Ronald McDonald House Orange County, Alzheimer's Orange County	Charles Antis founder/CEO (949) 461-9222/(949) 461-9244
BNY Mellon 1600 Newport Center Drive, Ste. 200 Newport Beach 92660-6209 Headquarters: New York Website: bnymellon.com		•45 •1,981	Provides investment management, custody, wealth and estate planning and private banking services	JDRF, Think Together, American Red Cross, Segerstrom Corporate Council, UCI Center for Investment and Wealth Management, Girl Scouts of Orange County, Habitat From Humanity	Shannon Kennedy/Carla Furuno president, US Markets – Southwest/ regional president, Newport Beach (949) 397-2439
Clearinghouse CDFI 23861 El Toro Road, Ste. 401 Lake Forest 92630-4735 Headquarters: Lake Forest Website: clearinghousecdfi.com		•26 •36	Provides innovative and affordable financing	The Allen Peters Baldwin 'B' BOLD Internship Award Program; offers summer internship program for college-bound high school juniors and seniors from low-income families; support for nonprofits include WisePlace, South County Outreach and Adopt a Family	Douglas J. Bystry CEO/president (949) 859-3600/(949) 859-8534
Davis Farr LLP 2301 Dupont Drive, Ste. 200 Irvine 92612-7503 Headquarters: Irvine Website: davisfarr.com		•44 •50	CPA firm	Families Forward, Project Hope Alliance, community service projects, quarterly luncheons	Marc Davis/Jennifer Farr/Ron Rolwes founding partners (949) 474-2020/(949) 263-5520
Driver SPG 1501 S. Harris Court Anaheim 92806-5932 Headquarters: Pasadena Website: driverspg.com		•38 •38	General contractor-tenant improvements, renovations, new construction	Partnerships include HomeAid Orange County, McKenna Claire Foundation, ALS of Orange County, and Surfrider Foundation	Matt Loorya senior VP (855) 300-4774/(855) 329-2774
Echo Media Group 2842 Walnut Ave., Ste. A Tustin 92780-7054 Headquarters: Tustin Website: echomediategroup.com		•19 •19	Marketing communications agency	Simon Scholars Program, Someone Cares Soup Kitchen, High School Inc., Cystic Fibrosis Foundation, Spooner Girls Foundation, Rotary	Kim Sherman CEO/president (714) 573-0899/(714) 573-0898
Idea Hall 611 Anton Blvd., Ste. 140 Costa Mesa 92626-7005 Headquarters: Costa Mesa Website: ideahall.com		•22 •22	Branding, marketing and public relations agency	Supports Chapman University, Cystinosis Research Foundation, Court Appointed Special Advocates, Buchanan Children's Charities, Orange Catholic Diocese and others through cash donations, agency-sponsored fundraisers, service discounts and promotion	Rebecca Hall CEO/president (714) 436-0855/(714) 263-8772
O'Melveny & Myers LLP 610 Newport Center Drive, 17th floor Newport Beach 92660-6429 Headquarters: Los Angeles Website: omm.com		•96 •1,460	Law firm	Participates in the elder abuse clinic, hosts pro bono clinics; employees participate and volunteer in disaster relief fundraising drives, S.O.S. adopt-a-family, UCI, local nonprofits such as the Legal Aid Society, Public Law Center, Veterans Legal Institute, among others	Elizabeth McKeen managing partner (949) 823-6900/(949) 823-6994
Sports 1 Marketing 9900 Research Drive Irvine 92618-4309 Headquarters: Irvine Website: sports1marketing.com		•25 •25	Sports and entertainment marketing agency	Crescent Moon Foundation, Unstoppable Foundation	David Meltzer/Warren Moon CEO/president (949) 336-6380
Umberg Zipser LLP 1920 Main St., Ste. 750 Irvine 92614-7262 Headquarters: Irvine Website: umbergzipser.com		•12 •12	Law firm	Orange County Bar Association, Association of Business Trial Lawyers, Constitutional Rights Foundation, Public Law Center, Federal Bar Association, State Bar of California, California High Speed Rail Authority, Afghanistan project	Dean Zipser/Tom Umberg founding partners (949) 679-0052/(949) 679-0461
Windes Inc. 18201 Von Karman Ave., Ste. 1060 Irvine 92612-0110 Headquarters: Long Beach Website: windes.com		•35 •135	Accounting firm	Supports the Cystic Fibrosis Foundation's Great Strides event in Huntington Beach; Beach, Brews & BBQ event; Garden Grove Boys & Girls Club	Jeffrey S. Fields partner (949) 271-2600/(949) 660-5681
ymarketing 4000 MacArthur Blvd., Ste. 350 Newport Beach 92660-2517 Headquarters: Newport Beach Website: ymarketing.com		•76 •76	Digital marketing agency	FOCUS program is a partnership with the Federal P21 Initiative and the Anaheim High School District; Children's Hospital Orange County (CHOC) Family Dinners quarterly events; Farm Fridays at the Orange Home Grown (OHG) educational farm	Ryan Lash CEO (714) 545-2550/(714) 242-7762
Zumasys Inc. 9245 Research Drive Irvine 92618-4286 Headquarters: Irvine Website: zumasys.com		•48 •80	IT solutions provider; IT infrastructure, cloud computing, and software development solutions	Rise Against Hunger, Orangewood Foundation, Second Harvest Food Bank, Art & Creativity 4 Healing	Paul Giobbi CEO (949) 334-0287/(949) 334-0288

Source: Santa Ana-based OneOC and the companies
Abbreviations: wnd: would not disclose
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Researched by Dana Truong



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Disney's Look at Anaheim Resulted in Game Changer

Stakeholders Helped It Identify Youths' Needs

By KIM HAMAN

There are times when a simple idea leads to an unimagined result. That was the case a few years ago, when **Lisa Haines Heppelmann** and **Jill Bolton** of **Disneyland Resort** decided to take a closer look at how the organization invested philanthropic dollars.

It turned out to be well worth the effort. "As one of the largest employers in Orange County—and the largest in Anaheim—Disneyland Resort has a long history of being deeply committed to the community," said Haines Heppelmann, vice president of public affairs.

"In 2011, we started to do an internal shift. We wanted to be more strategic about how we give and to which organizations. Rather than just writing a check, we really wanted to increase our impact in a deeper, broader way. And we also wanted to make sure that we weren't basing our new strategy off anecdotal information. We needed to find out what was really going on in Anaheim."

A simple, straightforward mission: learn how to be more strategic in philanthropy and apply the lessons to corporate giving. No one—least of all Haines Heppelmann and Director of Corporate Citizenship Bolton—imagined at the time where the journey would lead. The end result—creation of **Accelerate Change Together (ACT) Anaheim**—is the reason Disneyland Resort is the winner of the Business Journal's first annual Civic 50 award in the Legacy category.

Legacy firms on the list are those considered to have been civically engaged for more than a quarter-century.



Helping carry the load: Disneyland volunteers transport playground equipment in one community effort

Uncovering the Needs

In early 2012, the two executives set out to talk with stakeholders: school administrators, business owners, city council members and others with their fingers on the community's pulse. The resort has a vested interest in making sure that the youth of the Anaheim are poised to succeed.

"We wanted to understand what the top three or four issues in Anaheim really needed to be contended with," Haines Heppelmann said.

She and Bolton said they discovered it had been more than two decades since the city had

conducted a youth assessment.

"There were a lot of shifts in Anaheim during those years," Bolton said, "demographic changes, economic issues ... finding out precisely what was going on with Anaheim youth just didn't rise to the top of the city's priorities."

The pair realized a formal study was needed, and brought in Santa Ana-based **Olin Group**, which surveyed city officials, school administrators, business leaders, focus groups, parents and various nonprofit groups over a six-month period beginning that summer. The survey was designed to uncover the most pressing issues

facing Anaheim's youth. The results included qualitative and quantitative data.

"We had statistics about gang activities, teen pregnancy and youth crime," Bolton said. "One of the things the Olin Group study found was that after-school programs weren't providing programs that focused on these issues."

"The survey also showed us that there were more programs for younger kids, but the older kids, there were very few programs," Haines Heppelmann added. "We also learned that even though there were programs, kids couldn't always access them. There was a gap as to geography—whole pockets of Anaheim that didn't have access to programs."

One of the most surprising things the report showed was that Anaheim's various nonprofits, even when they had similar goals and philosophies, weren't connected to each other. "They were very siloed in the way they were doing it," Haines Heppelmann said. "There was missed opportunity to work together to increase their impact. By collaborating, they could be doubly effective."

Coming Together

The Disneyland team believed the gap should be addressed, and not just by the resort changing its giving strategy, but via collaboration.

"We knew tackling these challenges was bigger than just us," Bolton said. "Thankfully, we live in a community with a number of like-minded organizations that have just as much passion for the community as we do."

Disneyland had long-standing relationships with the Los Angeles Angels of Anaheim and with the Anaheim Ducks. Haines Heppelmann and Bolton began a series of conversations and lunches with leaders of the two, among them

► *Disney 34*

BofA Spreads Its Money, Expertise Throughout OC

Thousands of Hours, Cash Donated Every Year

By KIM HAMAN

A financial literacy program to teach young people better money habits. Ongoing training for nonprofit leaders. A food and supplies drive for homeless military veterans, whose donations nearly reach the ceiling.

Those sound like they're taken right from a community wish list for making the world a better place. In actuality, all of them and numerous other projects are taking place in Orange County as the result of **Bank of America** initiatives designed to answer pressing issues facing communities.

More Than Words

"For Bank of America, community commitment is the fabric of our being," says Orange County Market President **Allen Staff**. "It's not something we just came up with. Bank of America has always responded to customers' needs and worked to give back locally to help our customers be more successful."

The commitment and the effect it's had on Orange County brought Bank of America the Business Journal's first Civic 50 award in the large company category.

"Our ability to make a significant impact in communities around the globe depends on leveraging the full power of our company," says **Shari Battle**, Orange County Enterprise Business & Community Engagement market manager. "Our size, scope, expertise, partnerships and reach gives us the ability to work with partners in all sectors on building stronger communities and more stable economies."



Can't give enough: Bank of America OC Enterprise Business & Community Engagement Market Manager Shari Battle; OC Market President Allen Staff; OC HR Manager Cami Briggs, with donated items ready for distribution

Employees volunteer thousands of hours each year to local causes, bolstered by the bank's program of giving two hours paid time off each week to every staffer, from top-level executives to the newest hire. One person might use the time to read to their children's class. Another might decide delivering Meals on Wheels is the most impactful use of its two hours. Or an employee might take on a prominent role in the community—Staff, for example, still coaches a Pop Warner football team, though his children are grown.

Last year, employees in the Orange County

market donated 40,000 hours to various causes throughout the community, according to **Cami Briggs**, Orange County human resources manager. At year-end, the company rewards each volunteer by donating grants of up to \$500 in their name to the organization of their choice.

"We have a staff here in Orange County of approximately 4,500 people," Briggs says. "Almost everybody, from the CEO on down, takes part in the volunteer program. It's really special to see that—so many people excited to make a difference, and knowing they have such strong support to do so."

Bank of America also sets up team bonding events centered on helping the community. "We used to go bowling or to dinner or something like that," Briggs says. "Now every team builder is about helping others. One of our recent team builders, for instance, was cooking dinner for families at the Ronald McDonald House. We've also built homes for Habitat for Humanity."

Acting on Needs

As impressive as the employee volunteerism is, it's just the beginning. The company also developed several initiatives to help build thriving communities. The nationwide **Neighborhood Builders**, founded in 2004, awards high-performing local nonprofit groups with \$200,000 grants in every market.

"Part of the award includes leadership training for two people from the nonprofit, an executive and an up-and-comer," Battle says. Three times a year, OC market winners meet with those in other markets to learn how to develop stronger strategic plans, chart a succession plan, navigate tough economic times, and enhance funding opportunities.

Last year, **Boys & Girls Clubs of Central Orange Coast** was the Orange County recipient; past beneficiaries include **Girls Inc.**, **Kidsworks**, **Goodwill of Orange County** and **Think Together**. Since the program's inception, the bank says it's invested more than \$180 million in 900 nonprofit organizations across the U.S., providing leadership resources to nearly 2,000 nonprofit leaders.

Military veterans initiatives are also a priority, as illustrated by the company's commitment to hiring veterans—10,000 vets came on board last year—and by its partnership with a **Saddleback College** program that provides services to home-

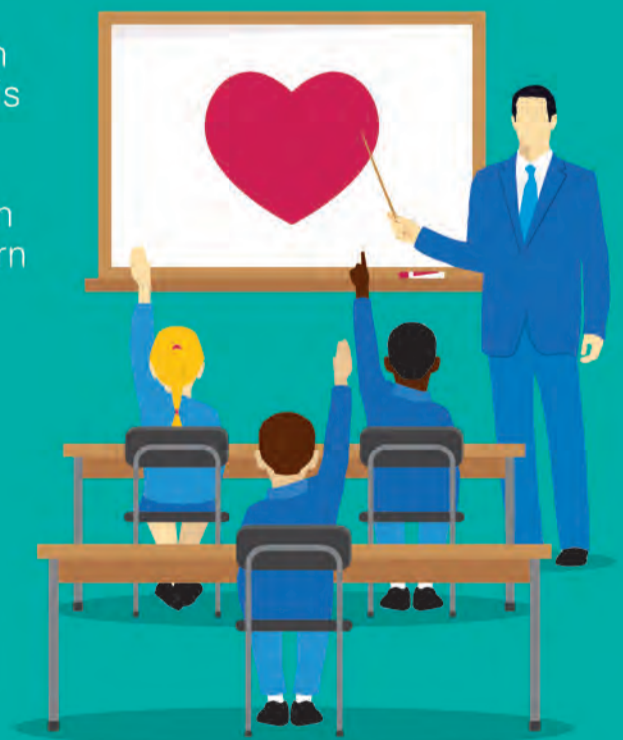
► *BofA 34*

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- UCI Foundation
- Illumination Foundation
- United Cerebral Palsy
- CHOC Childrens Foundation
- American Heart Association
- Juvenile Diabetes Research Foundation
- Human Options
- Kidworks
- Pacific Symphony
- Pretend City
- Discovery Cube
- Cal State Fullerton Philanthropic
- Hoag Hospital Foundation
- National Multiple Sclerosis Society
- South Coast Repertory
- Cystic Fibrosis Foundation
- Special Olympics Southern California
- Make A Wish Orange County

kpmg.com



KPMG Looks Between the Lines to Help Children

Tax Firm Staff Good At Math But Give Out Books

By KIM HAMAN

Every few months, employees at KPMG's Orange County office trade in their crisp suits and smart outfits for jeans and comfy shirts, turning a workplace full of accountants and tax specialists into a group of folks who look ready to head to a ballgame. And each happily pays \$5 to do it.

The money is used to support what employees consider one of its most important missions: providing life-long learning opportunities for future generations, starting with tools like literacy. The mission is woven through everything the staff does, executives say, and is also the reason KPMG is winner of the Orange County Business Journal's first annual Civic 50 award in the medium-size business category.

Combating Illiteracy

Literacy is a cornerstone of KPMG's civic engagement because it's "one of the biggest indications of future success," Partner **Mark Thomas** said.

"The highest indicator for literacy is the number of books in the home. Many children in Orange County, especially lower income kids, just don't have access to books in the home."

Partner **Tina Stoliar** said, "Our goal is to put new books in the hands of kids that they can take home and enjoy. Hopefully this will help them break the cycle of illiteracy."

KPMG wants to deliver 2,000 books to Orange County children this year and 2,500 next year. The goal may sound a bit daunting, but



Talking engagement: Office Managing Partner Mark Clemens; Managing Director Veronica Coffie; Partner Mark Thomas

thanks to a program put in place in 2008, it's not only reachable but likely can even be surpassed.

The Family for Literacy program is a company-wide initiative that provides children from low-income families with new books. It's set up in collaboration with **First Book**, a Washington D.C.-based nonprofit organization that distributes new books and learning materials to children in need across the country.

Giving in Community

Each of KPMG's 82 market offices is respon-

sible for obtaining books for underprivileged children in their communities. Stoliar heads the program in Orange County. She said donated books are provided by KPMG employees and that the program is fully self-funded. "We either buy the books ourselves, or raise money to buy books. We hold lots of fundraisers. Remember those jeans days?"

KPMG recently held a firmwide virtual auction. Each office put up an auction item for colleagues around the country to bid on.

"Of course, our auction item was a Disney-

land package—hotel, airfare, the works," Thomas said. "That package brought in outrageous money."

Each year, Stoliar meets with colleagues to review the program's budget and determine what they want to accomplish. The team actively seeks partnerships with local schools and charities.

"Literacy aligns with the goals of many of these nonprofits," she said. "We are able to do something for them as long as it's geared towards literacy for economically disadvantaged or homeless kids."

Office Managing Partner **Mark Clemens** said his travels around Orange County give him ideas for collaboration. "I'm always thinking, could we be partnering with this nonprofit? Pretend City is a great example. Discovery Cube—they bring a lot of lower-income kids through the science center. We're looking for those kinds of opportunities."

KPMG has partnered with those organizations and numerous others that serve children, including **Taft Elementary School** in Santa Ana, **Children's Hospital of Orange County**, **Olive Crest**, the **Assistance League of Newport Beach** and the **Illumination Foundation**.

While the program is primarily focused on providing books, another key component is company volunteers' engagement with the children who receive the books. They read to them, help them select titles and work on art projects, and spend time with them exploring the world of imagination.

Emotional Connection

Stoliar said the experience can be extremely moving.

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O'Melveny Attorneys Help the Helpless at Clinics

Beneficiaries of Pro Bono Work Include Elderly, Vets

By KIM HAMAN

The elderly woman had made her decision. She needed to get her granddaughter out of her home. She loved the young woman dearly, but the substance abuse problems she struggled with had changed the girl into someone her grandmother no longer recognized.

The granddaughter's friends had also started making the home their own. The yard, once a peaceful retreat, was always filled with boisterous people who didn't seem to have anywhere to be. The once tidy house was a mess. The granddaughter ignored her grandmother's pleas to get them out. Worst of all, items started to go missing from the house, and money frequently disappeared from the grandmother's purse.

She wasn't sure what to do. A person of limited means, she didn't have the resources to hire a lawyer—besides, she didn't want to lose contact with her granddaughter or get her into serious trouble.

The grandmother and her daughter, the aunt of the granddaughter, made their way to the Orange County Courthouse in Santa Ana, where they found exactly what they needed: the Elder Abuse Clinic, a free legal clinic that helps senior citizens navigate the winding landscape of the law.

She was immediately greeted with a warm smile from **Ashley Pavel**, an attorney with the Orange County office of **O'Melveny & Myers LLP**. Nearby was a young law student, and the room was filled with other seniors sitting with lawyers. The grandmother and Pavel went to work on her situation.



Teamwork: front: Director of Corporate Social Responsibility and Alumni **Rochelle Karr**; Partner **Brett Williamson**. Back: Office Administrator **Tammy Franklin**; Counsel **Ashley Pavel** and COO **George Demos**

Filling a Need

Three years ago, the clinic didn't exist. In fact, it's the first OC clinic specifically for elderly people, said O'Melveny partner **Brett Williamson**. It's the result of a collaboration between the firm's local office, the **Legal Aid Society of Orange County** and the **University of California Irvine's** law school.

Since 2014, the clinic has given approximately 1,800 residents guidance on legal issues. O'Melveny attorneys help them work through cases that include domestic abuse, financial fraud, manipulation in connection with estates,

and contractor fraud.

It's just one of the numerous pro bono and volunteer projects that O'Melveny lawyers, associates and staff take the lead on. The firm's corporate social responsibility centers on leveraging staff skills, knowledge and contacts to give access to justice to those who need it. The philosophy is why the firm's OC office is the winner of the Business Journal's first annual Civic 50 award in the small companies category.

The elder abuse clinic came about when OC Superior Court Judge **Kim Hubbard** recognized a need for elderly residents to get legal

assistance for a range of problems. She approached the Legal Aid Society and UCI's law school to ask how they could help. UCI pro bono coordinator **Anna Davis** reached out to Pavel and Williamson.

"Kim (Hubbard) had noticed that elderly clients would almost always come before her pro se, or without legal representation," Williamson said. "They would come in saying, 'I have a problem,' not realizing how many formal steps are needed for petitions and temporary restraining orders."

The collaborators put their heads together to come up with a real solution. Now O'Melveny attorneys and UCI law students provide seniors with the legal information they need to move their cases forward. The students work under the direct supervision of O'Melveny attorneys, and the Legal Aid Society manages the clinic.

"It's very empowering for the seniors," Pavel said. "At first, it's almost a therapy session. They come in distraught. So you sit with them, you get the story, you organize the story because it comes in nonlinear pieces. You really empower them: Here are the forms. This is when your hearing is. This is how you give notice. They walk out having ownership of the process and a plan for how it's going to be better."

O'Melveny hosts other clinics, including one to help military veterans navigate the complexities of changing their discharge status, and another that helps unaccompanied immigrant children. The latter is held in conjunction with **Kids in Need of Defense**, which works to ensure no child appears in court without a lawyer.

Support from Leadership

"The pillars of our corporate social responsibility mission are diversity, sustainability, access to justice, access to education and access to

► O'Melveny 36

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Civic 50

COMPANIES AND EMPLOYEES

Investment, Integration

Numbers show the time companies and employees give to causes, and how the work connects with the wider aims of both.

Investment

56

% of Civic 50 firm employees who volunteer

223K

Hours Civic 50 firm employees give annually

68

% of firms that use community work in marketing, PR

76

% of firms where community work develops employee skills

Integration

Note: Some numbers rounded
Sources: True Impact LLC, Business Journal analysis

Research by Dana Truong
Graphics by Brette Miller

Disney

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Angels Baseball Chairman **Dennis Kuhl** and **Tim Ryan**, executive vice president and chief operating officer of the Ducks. Over time, enthusiasm grew for a new organization to address the needs of the youth.

“When (Disneyland Resort president) **Michael Colglazier** came on board, he was really excited about it in terms of the impact it would have,” Haines Heppelmann said. “It became a passion.”

With the three corporations now on board, the initiative was a reality. Over the fullness of time, it was christened ACT Anaheim, which officially launched in 2013.

The three founding corporations, the resort, the Angels and Ducks, agreed to serve as initial funders, each contributing \$1 million over three years.

Changing Anaheim

The initiative invests in nonprofit organizations in Anaheim that address critical gaps in services for youth and families. The nonprofits work together to develop measurable goals ad-



In it together: Disneyland Resort President Michael Colglazier with VoluntEAR leadership council members

ressing four main points: preparing youth for college and career; encouraging healthy lifestyles; increasing youths' engagement with

the community; and helping ensure positive involvement with adults and parents.

Among the first groups chosen to receive

grants were the **Boys and Girls Club of Anaheim**, **Taller San Jose**, **Girls Inc.**, **YMCA** and **Hope Builders**. There are now 14 involved in the program.

Realizing that ACT would need an expert in administering such a big initiative, Haines Heppelmann and Bolton reached out to Orange County Community Foundation President **Shelley Hoss** to ask if the nonprofit would be managing partner. Hoss loved the idea, and the foundation's board agreed to the request.

“The Orange County Community Foundation orchestrates the touchpoints,” Haines Heppelmann explained. “Their support is invaluable.”

In the four years since its founding, ACT has served over 15,000 youth and family members. Initiative funders have also increased—it's no longer just Disneyland, the Angels and Ducks donating funds; Newport Beach-based **Pacific Investment Management Co.**, **Bank of America**, the **Ueberroth Foundation** and others are also providing.

“We never imagined this is what would result when we started on this journey five years ago,” Bolton said. “It's succeeded beyond our wildest dreams. We are so proud, humbled and grateful.” ■

BofA

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less or near-homeless veterans as they attend college and work to put their lives back together.

“When they give a request, we totally run with it,” Briggs says. She points to the company's recent supply drive as an example. “Everyone brought something in. Our entire conference room was filled with notebooks, pens, pencils, paper, Cup O' Noodles ... basically anything and everything a college student

needs. We had stacks of supplies probably seven or eight feet high.”

Far-Reaching Impact

Given the nature of Bank of America's business, it makes sense that there's a vested interest in helping people become more financially savvy.

That's why it partnered with **Salman Khan**, founder of online education resource center **Khan Academy**, to create Better Money Habits, a website where users find free tools and information to help them make smarter, more-confident financial decisions.

Taking the idea a step further, the bank partnered with **California State University-Fullerton** to bring the lessons and ideas into the classroom, where its associates volunteer to help students understand the intricacies of financial topics, such as credit, paying for college, planning for retirement. **Chapman University** and the **University of California-Irvine** are working with it to set up similar programs at their schools.

“What's also great about this program is that many of the volunteers are actually alumni from these schools,” Staff says. “They're back in the classroom, just in a new way.”

The company is “committed to being a true partner to the nonprofits we work with,” Staff says. It's a long list that includes **ACT Anaheim**, **Community SeniorServ**, **Consumer Credit Counseling**, **Families Forward**, **Mercy House**, **OneOC**, **South Coast Repertory**, **Special Olympics** and **Taller San Jose**.

“It's not just about writing a check and being done,” Staff says. “Think about the impact that helping just one person has. That person, the one you helped, goes on to affect others in a positive way, to help them. Then that person helps another ... The dividends go way beyond that one person.” ■



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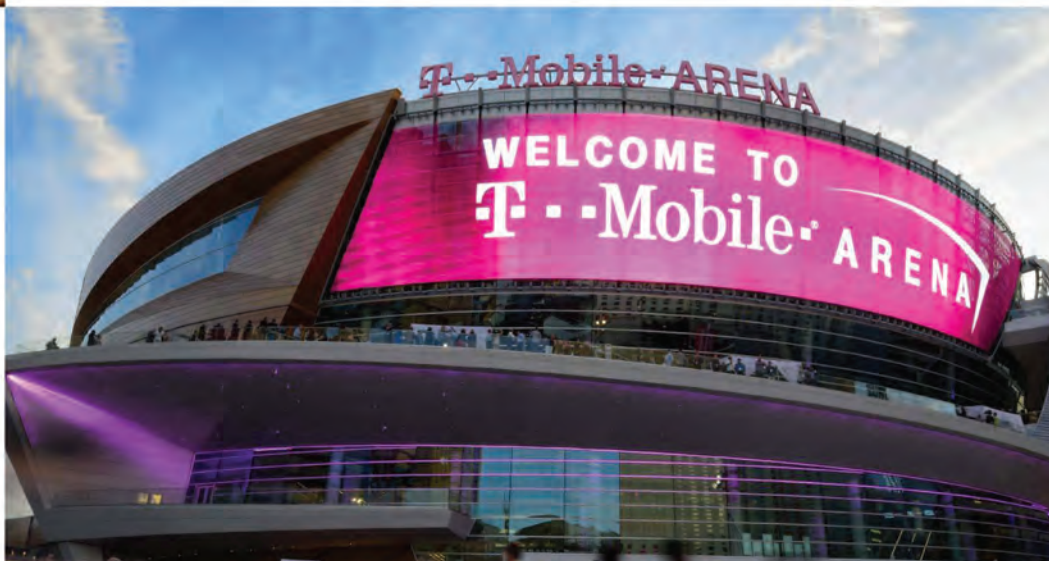
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Civic 50

COMPANIES AND EMPLOYEES

Incentive, Impact

Numbers show how companies support community groups and encourage employees to do so, and measurements of involvement.

Incentive

\$28M

Cash given annually
in OC by
Civic 50 firms

74

% of firms that
offer employees
volunteer time

Impact

44

% of firms that measure
impact of community
engagement

50

% of firms that
include volunteering
in dept. goals

Note: Some numbers rounded
Sources: True Impact LLC, Business Journal analysis

Research by Dana Truong
Graphics by Brette Miller

KPMG

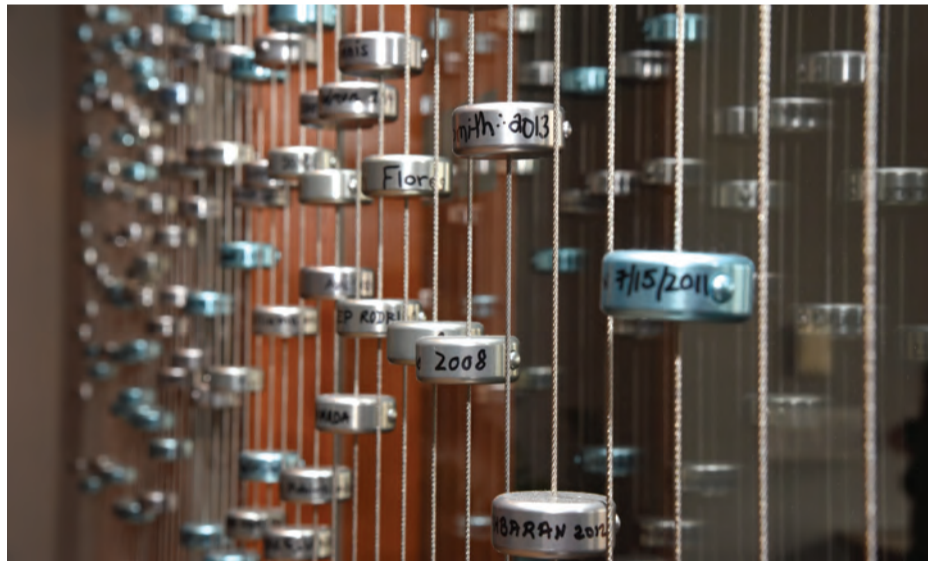
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"I was a volunteer at an after-school program run by the Illumination Foundation," she recalled. "Most kids are shy. But there was this one boy, about 7 years old, very smart. He just took command. He was explaining the situation in the book to the other kids, helping them understand. Watching him with the other children, I was just transformed by the experience."

Thomas described the emotional impact he experienced: "I'm involved with Olive Crest Safe Families for Children," he said. "When a child is taken out of their home in an emergency situation, they need a place to stay. My family takes in the kids in this situation. One of the children who showed up came just with this little backpack. One of the few things in it was a book from the [literacy] program. It had the little sticker in it. It was one of his most treasured possessions."

Foundation for Life

The program also has an impact in other areas as the foundation of a KPMG lifelong learning



Legacy wall: each disc represents an employee, bears start date

continuum for people of every age in the community. The firm calls it a "value chain."

"Our whole citizen effort at KPMG is about life-long learning," Clemens said. "It starts at the elementary school level, goes into middle school and high school. We're active at univer-

sity levels."

The program focuses on prekindergarten through fifth grade. The next link in the chain is partnerships with Junior Achievement concentrated on financial literacy for middle-school students. And the relationship goes beyond that:

Volunteers from KPMG also teach Junior Achievement classes on everything from work ethic to financial literacy and how to start a business. And the KPMG Foundation gave the organization a \$1.5 million grant to help it research and rewrite its curriculum.

Other links in the value chain include programs designed to inspire interest in the accounting profession among high school and college students and help doctoral students through school, then become mentors to the next generation. Finally, the firm supports business professionals through its Women's Leadership and Women Corporate Directors.

"Giving back to the community has been part of KPMG since the day I started 27 years ago," Thomas said. "We want to give our employees the opportunity to find what they want to do. If they're interested in healthcare, let's get you on the board of Red Cross. If you're interested in underprivileged kids, let's get you involved with Orangewood Foundation."

KPMG gives its employees 12 paid hours off each year to volunteer and discover their passions. But most volunteer far more hours because, as Coffie puts it, "We get so much more back than we give." ■

O'Melveny

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healthcare," said O'Melveny Director of Corporate Social Responsibility and Alumni Relations **Rochelle Karr**. "The Elder Abuse Clinic and other clinics we host provide access to justice that people may not otherwise have had."

The firm's CSR department was formed in December 2015 after Carr approached Chief Operating Officer **George Demos** with the idea. "I literally jotted it down on the back of a napkin at Red O," Carr said with a laugh. But O'Mel-

veny has long been engaged in the community.

"There were already so many wonderful things happening in the area of CSR throughout the firm, I just needed to corral them," Carr said.

"Creating the department was about creating structure around what we already had in place. Our leadership is completely supportive, not just with the dollars and the time, but also in the way they treat pro bono hours. Those hours are treated exactly like billable hours when it comes to advancement and bonuses, which is unusual for a law firm."

O'Melveny has legal expertise in a broad range of practice areas, including commercial,

corporate, antitrust, labor and appellate litigation. Many of its corporate clients have their own legal departments.

"We often partner with our clients on pro bono work," Carr said. "Every day I get emails from clients asking how we can share our passions, work together and have greater impact. At the end of the day, it's much more meaningful for all parties to be working together."

'We'll Be There'

"Across the board, you ask what the most meaningful part of our work is, and we will always say our pro bono work," Carr said. "It's

what matters to the O'Melveny lawyers. The real impact we can have, seeing people who now have hope."

That's what the desperate grandmother finally got: hope. After working with Pavel, she obtained a limited restraining order that got her granddaughter and her friends out of the house while still providing for supervised visits with her granddaughter.

"These things are so rewarding," said Pavel, who invites lawyers from any firm to join O'Melveny at the Elder Abuse Clinic. "We're always looking for more attorneys to support it," she said. "Just reach out—we'll be here." ■



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Pearls with their elegance, versatility and beauty remain a steadfast fashion statement year after year. Today, their popularity continues, and pearls are coveted by women of all ages. Lugano Diamonds' ability to procure the rarest and most unique stones are exemplified in these stunning creations, which look beyond the iconic classic strand.



Rare Conch Pearls

Conch pearls are from the Caribbean's Queen's Conch: about one in 10,000 Queen Conch sea snails produces a conch pearl, and just one in 100 is of gem quality. Accordingly, high quality conch pearls have a probable occurrence of one in a million, and attempts to culture them have failed. As a result, they remain one of the world's rarest pearls. This stunning Lugano Diamonds Conch Pearl Necklace is a beautiful vine of diamond flowers with pink Conch Pearl centers in various sizes. With 22.43 carats of Rose Cut Diamonds and 3.62 carats of Round Diamonds, it is truly a rare beauty.

Natural Pink 18mm Kasumi Pearl Ring

Grown in the fresh water of Japan's Lake Kasumigaura, Kasumi Pearls are famous for their intense natural colors and historical significance in the pearl culturing world. Pearl sizes range typically from 9 to 13 mm although most are between 10 to 12 mm, which makes this Lugano Diamonds 18 mm Pink Kasumi Pearl Ring one of major significance. Pink Diamonds, 2.54 carats worth, are set in rose gold and surround this lustrous gem intensifying the stunning pink color. A white gold band with 20 Round Diamonds is the finish to this masterpiece.



No Need To Choose Your Favorite Pearl Color With These Earrings

Lugano Diamonds pleases pearl lovers with these Triple Pearl Drop Earrings that may be easily interchanged with a different color to perfectly suit your fashion style. More than 13 carats of Marquise, Round and Pear Diamonds provide the perfect setting for these lustrous pearls.

"Our customers take pride in wearing beautiful jewelry that is truly one of a kind," said Lugano Diamonds CEO and Design Director Moti Ferder. *"What I look for in procuring rare pearls are color, size and, of course, a beautiful luster."*

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Better Late Than Never – The New and Improved Nonprofit Financial Statements

While standard-setters have been focused primarily on public and private commercial enterprises (think revenue recognition and lease accounting), nonprofit organizations are finally about to join the party. Since 1993, nonprofit financial statements have been prepared under the same guidance. That will soon change with the introduction of FASB's Accounting Standards Update (ASU) 2016-14, which is required for calendar year 2018 and for fiscal years ending in 2019.

So whether you are a nonprofit board member, a preparer of nonprofit financial statements, or someone who reads nonprofit financial statements prior to making a giving-decision, here are the most impactful changes you can expect from this new and improved financial reporting standard.

1. Focus on Liquidity – A significant change is the requirement for enhanced qualitative (narrative) and quantitative (numbers) reporting on financial resources. Financial assets available to meet expected cash needs for general expenditures within one year of the balance sheet date is now required. The ultimate goal here is to inform the reader of the financial statements about any limitations on the use of liquid assets (typically cash and investments).

2. Simplification of Net Asset Classification – Today's practice of presenting net assets and annual operating activities into unrestricted/temporarily restricted/permanently restricted categories will be condensed into only two categories – "with donor restrictions" and "without donor restrictions." Of course, nonprofits will need to continue to disclose the amount and purpose of board-designated net assets.

3. Transparent Expense Reporting – All nonprofit organizations will be required to disclose expenses by both function (that is, program services and supporting activities) and natural class (such as salaries). The standard permits you to report this expense information in a financial statement or in the accompanying notes.

4. Report Investment Return Net of Expenses – In another move to simplify reporting, investment returns are now required to be presented net of external investment expenses, such as management fees and the salary/benefits of certain employees directly involved in investment management.

5. Changes to the Statement of Cash Flows – The new standard makes it less burdensome to use the direct method of cash flow reporting, as a separate reconciliation to the indirect method is no longer required.

Of course, change is never easy; however, there are important steps you can take now to make the implementation of ASU 2016-14 as seamless as possible.

First, educate yourself and educate key leaders in your organization (including board members) about the new standard. Second, develop an implementation plan. Whether you have an accounting/finance department of one or many, you need a thoughtful plan that includes required actions, timelines and resources required. Lastly, this is great opportunity to revise (or even create) policies, such as those involving board designations or expense allocation methodologies.

Although the pace of change in nonprofit financial and tax reporting has not been particularly rapid, a new day is dawning. As we prepare for ASU 2016-14, the FASB is considering Phase Two of this financial reporting project and has also proposed rules to improve the accounting and reporting of grants and contributions. These are welcome improvements to nonprofit financial reporting, and as they say, better late than never.



Rick M. Smetanka

Rick M. Smetanka is the partner-in-charge of the Audit and Business Advisory Services practice at Haskell & White LLP (hwcpa.com), one of the largest locally-owned accounting, auditing and tax consulting firms in Southern California. Rick advises nonprofit organizations and their boards on financial reporting, tax and governance matters. He also leads effective and insightful assurance, tax and consulting engagements for nonprofit entities and can be reached at RSmetanka@hwcpa.com.



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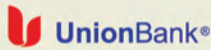
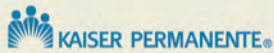
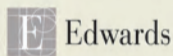
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THANK YOU FOR MAKING A DIFFERENCE FOR EVERY ONE OF US.

Orange County United Way congratulates our corporate partners who are **2017 Civic 50 OC honorees**. We are grateful that these community-minded companies have joined our fight for the Education, Health, Housing and Financial Stability of every person in Orange County.

UNITED4OC, we are turning this fight into a win. Together, we're creating brighter futures for every child and family right here in our community.



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During PIMCO's 2017 Global Week of Volunteering, PIMCO volunteers visited the Tina Pacific area of Stanton to work alongside Illumination Foundation staff on a neighborhood clean-up.



At Giving Children Hope in Buena Park, PIMCO volunteers sort donated clothing and shoes to ship out to Syrian refugees.

Building a Culture of Service at PIMCO

by Sarah Middleton, Senior Vice President, Global Corporate Citizenship at PIMCO; Executive Director, PIMCO Foundation

At PIMCO, we believe the power of people – both individually and collectively – can have a transformative effect on the social issues that impact our communities. We also believe that corporate citizenship is a powerful and imperative business practice. Through the PIMCO Foundation, we are able to combine both beliefs and effect positive change through simple acts of giving and volunteering around the world.

PIMCO's commitment to excellence goes beyond investment management. In addition to working relentlessly to create opportunities for the people and institutions that rely on us to manage their retirement and investment assets, the firm is dedicated to creating opportunities to help better the communities where we work and live by giving our time and resources. For us, corporate citizenship is an innovative opportunity to both strengthen our business and effect change locally and globally.

Corporate Citizenship Is a Business Imperative

Until quite recently, businesses viewed their roles in the community as limited to providing employment, paying taxes and obeying the law, but that perspective has evolved. Today, we look to businesses to take a more holistic view and embrace their role as corporate citizens.

Greater engagement, particularly in helping the more vulnerable segments of our communities, is integral to good business management and an imperative for a healthier society. Through corporate philanthropy and corporate citizenship, businesses can enable positive change and help provide leadership on important social issues – a natural complement to core business activities and responsibilities.

In *The Wealth of Nations*, Adam Smith wrote, "What improves the circumstances of the greater part can never be regarded as inconveniency to the whole. No society can surely be flourishing and happy, of which the far greater part of the members are poor and miserable."

Although Smith's opus was published in 1776, his words still ring true today. While capitalism has certainly improved the lives of billions, billions more remain in poverty. And, this is where businesses can help to create opportunities to advance global well-being.

Those Who Make Change Happen

The success of the PIMCO Foundation around the globe is driven by the dedication of my PIMCO colleagues and our nonprofit partners. My colleagues build houses for the underprivileged, tutor at-risk youth, raise funds for charities, stock shelves at local food banks, consult with small entrepreneurs in Peru, and so much more. These "good works" address real problems that affect the less fortunate.

Our nonprofit partners innovate and execute, leveraging their particular expertise to serve community needs, solve social problems, form cross-sector partnerships and better the world. We are lucky to partner with and support these organizations.

What Does Corporate Citizenship Look Like at PIMCO?

PIMCO continues to strengthen our culture of service through expansive giving and an employee engagement program. The PIMCO Foundation was launched in 2000, and our corporate volunteer program was formalized in 2007. These two efforts merged under the PIMCO Foundation banner in 2012. Since then, we've been learning, evolving and expanding our commitment.

For our employees, we offer an array of volunteer opportunities, including hands-on, skills-based, virtual, domestic pro bono and global pro bono. We also offer board placement, where we seek to match interested and dedicated PIMCO colleagues to local nonprofit boards.

Our two signature volunteer initiatives are Global Week of Volunteering – one week of marathon service each summer – and Share the Harvest, where about 800 PIMCO volunteers and their family and friends gather at the OC Fair & Event Center in December to pack 12,000 boxes of food for the OC Food Bank to distribute to Orange County neighbors in need.

We work with Taproot Foundation to facilitate the PIMCO Pro Bono Corps, through which we form project teams comprised of PIMCO colleagues with various skills and expertise, match these teams to local nonprofits that want to tackle an organizational challenge, and let the volunteers and nonprofits work together toward a sustainable solution. For example, a Pro Bono Corps team recently created a scalable Business Intelligence Strategy for The Wooden Floor, a creative youth development nonprofit that is expanding to a second campus. PIMCO volunteers completed an infrastructure assessment and software database evaluation to support current and future IT needs.

Since 2011, we've also run the Emerging Enterprise Program, a global pro bono initiative. This program, which was previously profiled in the *OC Business Journal*, is in partnership with TechnoServe, a multi-year partner that is focused on identifying business solutions to poverty. For the past seven years, we've deployed 21 PIMCO colleagues to Latin America to work alongside TechnoServe staff and coffee and cocoa entrepreneurs.

PIMCO

More recently, we joined the Global Health Corporate Champions (GHCC), a multi-company, multi-disciplinary cohort working on health system strengthening in emerging countries.

GHCC is an activity of USAID's Global Health Fellows Program II, and implemented by the Public Health Institute and PYXERA Global. From 2016 to 2017, seven PIMCO colleagues traveled to Accra, Ghana and worked with host clients on the ground for four weeks alongside volunteers from Dow Chemical, PwC, SAP, WE Communications and other companies.

On the giving side, we operate an employee matching gift program; we provide event sponsorships to nonprofit partners, and offer learning and development sponsorships for those partner nonprofits seeking training opportunities for staff. We also run a disaster assistance program and can quickly activate relief donations in times of crisis.

Our largest funding area is our annual Grants Program. Through it we support organizations focused on education and gender equality globally, as well as critical community needs in Orange County and the NY Metro area. We are intent on increasing our multi-year grants and funding the real cost (we allow grantees to use up to 25% of their grant toward administrative costs).

Business as a Force for Good

At PIMCO, we firmly believe that business can and should be a force for good, and that companies should embrace their role as corporate citizens. Collectively, we have the skills and knowledge and our colleagues have the willingness and enthusiasm to help create opportunities and maximize the possibilities of our communities far and wide. After all, as human beings, we are wired to help.

For more information, email pimcofoundation@pimco.com or visit www.pimco.com/pimcofoundation. Follow PIMCO Foundation: @PIMCOFoundation

Sarah Middleton

Senior Vice President for Global Corporate Citizenship, PIMCO
Executive Director, PIMCO Foundation

Ms. Middleton is a senior vice president responsible for global corporate citizenship and is the executive director of the PIMCO Foundation. She developed the firm's employee volunteer program and related corporate responsibility initiatives. On behalf of the PIMCO Foundation, she is part of the Points of Light Corporate Institute Leadership Faculty, serves as a Regional Voice Lead for IMPACT 2030, sits on the Orange County Commission to End Homelessness, and is a Huffington Post contributor. Prior to joining PIMCO in 2007, she served as an AmeriCorps volunteer and worked in the nonprofit sector for six years. She has spoken at national and regional conferences and was named by the Orange County Register as one of Orange County's "100 Most Influential" people of 2015. She holds an MBA from the University of California, Irvine and an undergraduate degree from The Catholic University of America in Washington, D.C.



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5 Ways to Work With Corporations to Help Orange County Thrive

Oftentimes, corporate giving is viewed as a black box of sorts. Mysterious, complex and difficult to unlock. In reality, many corporations want to build trusted partnerships with non-profit organizations to help develop more vibrant communities. The key is understanding the charitable vision of the corporation and creating win-win opportunities where both the non-profit and the for-profit partners achieve their own goals for success. Edwards Lifesciences, for example, offers non-profit organizations the following five ways to partner with its employees to strengthen Orange County.

1. Engage employees in volunteerism – Edwards aspires to have 100 percent of its employees participate in some form of charitable activity each year, whether company-sponsored or on their own. Discover how to take advantage of this pool by sharing your volunteer opportunities at Edwards.com/volunteer.

2. Pursue mission-aligned foundation grants – Edwards is dedicated to providing innovative solutions for people fighting cardiovascular disease. To that end, Edwards Lifesciences Foundation is focused on impacting the global burden of heart valve disease for the underserved and strengthening communities where its employees live and work. If your organization is pursuing a similar mission, learn more about Edwards Foundation's grant cycle at Edwards.com/corporategiving.

3. Share leadership opportunities – Edwards leaders support non-profit causes by donating their time and talent to serve on boards of directors, leadership committees and fundraising initiatives for organizations in Orange County and beyond. Learn more about its leaders' involvement in the community at Edwards.com/aboutus/ourleaders.

4. Seek needed in-kind donations – Edwards employees often lead donation drives to collect clothes, food, holiday gifts and other items for Orange County charitable causes. The company also hosts quarterly blood drives to give the gift of life.



5. Team-building – When Edwards teams come together to build relationships and connections with each other, it is common for a philanthropic cause to be the focus of the event. Share your team-building opportunities at Edwards.com/volunteer.

Are you a non-profit organization looking for dedicated partners to drive your vision, mission and goals? With thousands of employees eager to volunteer and numerous corporate foundations generously funding work, partnering with corporations like Edwards can help make our community a better place to live.

For more information, please visit Edwards.com/corporategiving.

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Not All Marketing Is Created Equal – How Analytics Changed the Game

Today’s marketing strategies have vastly evolved from the tactics of yesterday. New tools, technology and techniques have created a direct line of communication with those you hope to influence. And it’s no longer a one-way conversation. Today, intelligent marketing campaigns, rooted in analytics, create a two-way dialogue with your target audience allowing you to test, learn and fine tune targeting and messaging, and ultimately, make your marketing dollar go a lot farther.

Rather than casting a wide net and pulling in leads that may or may not be the right ones, today you can clearly identify your target audiences, where they are consuming media, deliver the right message at the right time, and ensure it resonates...at a fraction of the cost and with the ability to prove your results.

Because, let’s admit it, data speaks louder than words. Budgets are tight, the bottom line is ever important, and return on investment is at the forefront of the minds of the C Suite. It’s imperative to be able to prove the value of your marketing dollars. And do it transparently. At the end of each campaign, you should be able to look at the dollars spent and draw a straight line to the results achieved for that spend.

Are you trying to drive web traffic? Sell a product through ecommerce? Collect customer information for future marketing efforts? Grow your social media platforms? Clearly defined goals ensure a roadmap for success. By developing intelligent, targeted digital advertising campaigns, you can quickly achieve the desired goal at a considerably less cost than ever before. You no longer need to settle for traditional marketing tactics. With the right guidance, you can unlock a world of modern marketing that can ignite your brand and give you an edge on the competition.



Kim Sherman
President & CEO

This competitive edge comes from the ability to make adjustments in real-time to maximize results. It doesn’t take long to determine if something is misaligned and not generating the results you desire. Your targeting might be slightly off, or you could be reaching the right people, but your message is wrong. Nimble digital advertising, with the right analytics, allows you to quickly identify the disconnect, make critical changes, and immediately determine if your course correction worked.

So what does this intelligent marketing look like? It’s blending best-in-class communication disciplines—PR, social media, digital marketing, SEO and analytics—into data-driven campaigns designed to reach and influence your specific audience, fill the funnel and deliver results. We know, because at Echo Media Group, we deliver strategic, goal-oriented campaigns that maximize marketing dollars and generate a proven return on investment. Imagine spending less money and achieving better results? We like to call it The Echo Edge.

To learn more about the Echo Edge, visit www.echomediategroup.com.

Echo Media Group

We create and execute intelligent, creative, measurable marketing-communications programs designed to ignite brands and generate results. With a no-compromise attitude, we provide clients with data-driven campaigns that start conversations, generate conversions and drive return on investment.

Donahue Schriber and its employees would like to recognize the OC charities who work tirelessly to help those in need in our county. We are honored to be involved with many of these fine organizations and are grateful for their hard work and dedication to improving lives in our community.



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CONSTRUCTION

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R.D. Olson's hands-on service has earned it a loyal client base

One of the key traits of R.D. Olson Construction is to understand our customer's product and vision. We negotiate 80 percent of our business and are always working closely with the customer to build something that they are happy with and the company is proud of. Over time we have seen an increase in design-build type projects and have a sister company whose sole purpose is new development. Both entities work as very selective companies that know how to manage and make what they work on a success. Whether it is initially just a sketch on a napkin or a particularly detailed mission, the end result will always be what the customer wants to achieve.

Considering the amount of significance that is placed on the customer, R.D. Olson maintains a focus on keeping already existing clients satisfied. These strong relationships are what we use to build their future endeavors. A belief that I like to impart on our employees is that if 80 percent of the effort is put into the relationships with the clients that we already have, then it will generate 70 percent of the opportunities coming in. A major part of that is the company's use of its resources, which focus on those relationships and not geographic boundaries for where we will and won't build. Clients value working with 1 or 2 key R.D. Olson individuals that will be managing the project from the design development and estimating stage all the way through complete build out, punch list and property walks with property management.

R.D. Olson Construction specializes in being a "boutique builder" for its clients. We're providing hands-on service, and our employees are committed "from top to bottom" to our customers.

This approach has paid off for R.D. Olson. Today, 80 percent of our work is negotiated with clients and 70 percent of our annual volume is repeat business with prior clients.

Based in Irvine, Calif., our general contracting and construction management firm has extensive experience in hospitality work, as well as healthcare and multi-unit projects. Founder Bob Olson started the company 38 years ago, after working for a small general contractor.

Bob was concerned that the builder he was employed with was not delivering on its promises. He said, "I'm going to go out and start my own business." Bob began grassroots by doing home remodels and additions.

He then moved into the restaurant industry after meeting actor and singer Sonny Bono. Sonny asked Bob if he'd be willing to do the first Bono's restaurant. R.D. Olson built several locations for Bono until his death in 1998.

Today, the company's portfolio also includes hotels, offices, country and athletic clubs, and healthcare and higher education projects. In the last 25 years I have been at R.D. Olson, I attribute our success to the work environment, which gives autonomy to its employees.

Not only are they allowed to make important decisions, we empower them to be entrepreneurs and run this as their own company. We make sure to provide the support and guidance they need and it is our culture that ensures they feel a part of a team and a family.

R.D. Olson is keeping busy with a full slate of projects. We're running anywhere from 10 to 15 projects at a time. These can range from a \$2 million lobby renovations to a \$75 million high rise.

The company is also heavily involved in many adaptive reuse projects like renovating an office building into a hotel or turning a hotel into a timeshare development. That has been a very big segment for us.

One such project is the NoMad Hotel location in downtown Los Angeles in which R.D. Olson is converting a bank building originally built in 1923 into a 240-room, five-star property for The Sydell Group. This project is probably one of the most anticipated in the West Coast hospitality market today. We're looking to have heads on beds this Fall.

R.D. Olson's recent initiatives include updating our technology. Last year, we took

a step back and looked at everything. While the company is ahead of the industry in many areas, we've insisted on staying innovative which means improvements.

We invested heavily across the board, improving all our platforms. Our objective is to have a complete collaboration between all our different departments, from daily construction operations to accounting to our ongoing execution of contracts.

The company also aims to go completely paperless on our job sites. Our associates are building their projects on the mobile platforms they have available to them. They pull up plans, they pull up RFIs and have real-time information at their fingertips. These changes have made R.D. Olson more efficient in its work. We're able to respond quicker, and the software available to us keeps getting better and better.

R.D. Olson is coping with challenges managing the quality of resources, especially when selecting subcontractors. The industry has been crazy for the last number of years. We're all busy and we're all very careful with our selections because we have limited quality resources.

Additional market conditions have made work more challenging. Our clients are experiencing that financing is getting a bit tougher to get. The hotel industry is being cautious about how many more products of a certain type they allow in particular geographic areas.

Everyone is trying to balance the scale of supply and demand, and we predict the market will get less intense in the next two years. What I'm now starting to see is that things could start to slow down a little bit. The company sustains by partnering with customers earlier on projects. It's a way to start the negotiation process and keeps it in check until everyone gets a pulse on what's actually going to happen.

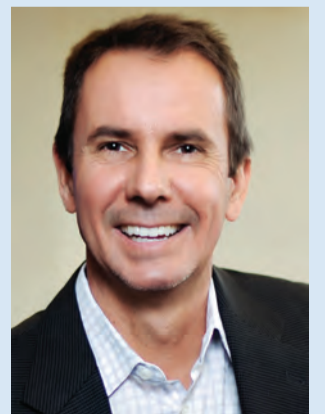
Despite these conditions, we predict much future success for R.D. Olson. Although conditions have plateaued in some of the company's markets, work will continue, and we should see our amount of renovation, as well as new build work increase.

There is obviously an interest in growing the company, but even more than that there is a desire to grow the individuals that work within our company. We have an education reimbursement program that allows our employees to continue their education on whatever aspect that they deem would help them be a better person both independently and professionally. This, combined with the community involvement that the company is devoted to, encourages long term association because employees know that the company stands for not only its own improvement, but the improvement of others. The involvement in local communities is something that R.D. Olson prides itself on. One example of our commendable work towards the greater good is the ongoing eight year relationship with the Golf Charity Tournament for the Pediatric Cancer Research Foundation, for whom we raised more than \$70,000 in 2017 alone. It is this sort of long standing belief in making change that sets apart the R.D. Olson employee; they each strive to make their workers the example of their company just as much as the projects that they complete.

For more information, contact R.D. Olson at info@rdolson.com or by calling 949.474.2001.

Bill Wilhelm

A leader in the construction industry with more than 30 years of experience, Bill Wilhelm serves as R.D. Olson Construction's president. Bill's team-oriented leadership approach inspires an entrepreneurial mindset that attracts the best talent in the industry. Bill has played a pivotal role in shaping R.D. Olson Construction to become one of the nation's top contracting firms. From spearheading team events to build homes for Habitat for Humanity, to pro-bono work for Cal Poly Pomona, Rady's Children's Hospital and work for the Ronald McDonald Corporation, community development is at the heart of Bill's leadership style.



About R.D. Olson Construction

Founded by Bob Olson in 1979 and led by President Bill Wilhelm, R.D. Olson Construction is one of the top 50 general contracting firms in California. R.D. Olson Construction is a premier builder of hotel properties for several national hoteliers, including Marriott, Hilton, Hyatt, Ritz Carlton, and Starwood. R.D. Olson Construction is also an experienced builder of office, retail, restaurant, multi-family, assisted living and recreational projects. www.rdolson.com

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How Will Your Story Be Written?

by Douglas K. Freeman, J.D., LL.M & Lee Hausner, Ph.D

If you could write your own life story, to be read in 50 years, what would you say about yourself? If your story were being written by your great-grandchild, what would you like it to say?

Will your legacy be based on your financial success or the impact of your life on your family and your community?

If your real legacy is what you have created for others, more than what you have created for yourself, then have you thought about what your family will be like 50 years from now? Will your children, grandchildren and maybe even great-grandchildren be leaders in business, the professions, art, science or government? Will they have positively impacted the lives of others, perhaps as teachers or maybe as philanthropists? Will they have strong, healthy and loving families? Will they like each other and still feel closely connected as an extended family? And will anyone remember you or your contribution to their lives and achievements?

Families that remain contributive, competent, compassionate, and connected for three to four generations past the wealth creator are known as Legacy Families. The great families create great legacy – for themselves, their descendants, and their community. How do they do it? You've read about some of these families, perhaps even met them. Some are household names, like Rockefeller or Rothschild. Others are less well-known outside their own community and family. But all share similar qualities and characteristics.

Legacy Families Demonstrate

Capacity: Members of a Legacy Family recognize the importance of contributions to the financial, human, intellectual, and social capital of their family and community. They add value to themselves and to those around them. Sometimes the value is expressed in financial results. But as often, such contribution comes in the form of public service, the arts, science, education, and healthcare, as well through effective parenting and grand-parenting.

Connection: Members of a Legacy Family are connected to their ancestors and to their descendants. The family heritage is nurtured and passed on to those who follow. These members maintain loving and positive family relations and promote effective generational governance structures, which assure the success of their successors.

Compassion: Members of a Legacy Family recognize their good fortune, empower each family member to become the best he or she can be, and willingly embrace their responsibility to give back. You'll see them volunteering their time and talent, sharing their financial resources, and helping to meet the needs of others.

Competency: Members of a Legacy Family develop the competencies to handle the responsibilities of wealth and effectively utilize the opportunities that have been provided to them. They have learned essential financial and life skills to enable them to be productive, self-sufficient, and collaborative adults.

Your Story May Not Have the Happy Ending You Wish Without Careful Planning and Preparation

It's as true in life as it is in business. To paraphrase the Cheshire Cat in Lewis Carroll's *Alice in Wonderland*, "If you're not sure where you're going, you're likely to end up somewhere else." You must have a thoughtful plan that will help guide you and your family. Your plan will need to:

- ▶ Articulate your vision and aspirations for the future;
- ▶ Address critical family issues like parenting, communication, collaboration, conflict resolution, and core values;
- ▶ Consider the resources that may be needed by the family over time;
- ▶ Establish a structure for governance and leadership that will help guide the family as it grows and develops; and
- ▶ Create a process for future generations to help each member shape their own future while nourishing their close family bonds.

It will be very difficult for any family to flourish through the generations if it does not maintain a balance in the four capitals of wealth. These four capitals – human,

financial, intellectual, and social – must be replenished and enhanced by each generation. If one generation is allowed to live off the success of those who preceded it, then future generations are unlikely to ever recover. Your family should strive to develop a strong model for:

- ▶ Collaborative decision-making;
- ▶ Communicating in a constructive, not destructive, manner;
- ▶ Resolving conflicts before they erode relationships;
- ▶ Setting realistic expectations of each other;
- ▶ Giving responsibility that's earned and holding each other accountable;
- ▶ Telling stories of the family history and heritage;
- ▶ Playing together and having fun; and
- ▶ Perpetuating the core values that define your family, such as integrity, caring, patience, and persistence.

Every family has the opportunity to be a Legacy Family. If you're successful in this effort, then 50 years from now your life's story will be told and retold at the gatherings of your large, loving, and productive family. Now that would be a story worth reading!

At First Foundation, we are concerned not just with the tax and economic consequences of wealth planning, but with the impact of that planning on the lives of those for whom the wealth was intended to benefit.

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Doug Freeman

Doug Freeman currently serves as founding Executive Chair and Chief Executive Officer of Orange County Music and Dance, a public charity created in 2016 and located in Irvine. OC Music and Dance, as it is more commonly known is the first and only nonprofit community school in Orange County, offering a comprehensive program in music, dance, voice, film and theater, along with adult programs in health and wellbeing. From 2008 until his retirement at the end of 2016, Doug served as Executive Vice President and Director of Consulting for First Foundation Bank. In that role, for approximately 18 months, he also served as Director of Trust Services. During his tenure at First Foundation, Doug provided strategic planning and organizational management advice for business, public charities, private foundation, and family clients.

Dr. Lee Hausner

Dr. Lee Hausner is an internationally recognized clinical psychologist focusing on the challenges of wealth in multigenerational families, as well as issues related to family businesses. She served as the senior psychologist for the Beverly Hills Unified School District for 17 years in addition to establishing a reputation as a sought-after keynote speaker, seminar leader and highly rated resource for organizations such as Young President's Organization (YPO), World President's Organization (WPO), and Entrepreneurial Organization (EO). Most recently, she assisted the University of Southern California in creating their Family Business Center and serves as the senior advisor to the program.

HERE'S TO



CORPORATE NEIGHBORS

To those who raise expectations — always ready to lend a hand. Working together with others to achieve new heights — and making Orange County a better place. Thank you.

We're a proud sponsor of The Civic 50 Orange County

FIVEPOINT®



We.care™ at Western Digital: Global Philanthropic Programs Make Positive Impact to the Communities Served

Western Digital creates environments for data, employees, and global communities to thrive. The company is dedicated to driving innovation in its labs, across its offices and to its customers, all while giving back and inspiring that same innovative spirit throughout surrounding communities.

The Western Digital Foundation's mission is to honor the company's commitment to exemplify corporate social responsibility through employee volunteerism, community grants, scholarships and product donations. The philanthropic focus areas include education for underprivileged and underrepresented youth with special emphasis on science, technology, engineering and math (STEM), hunger relief, environmental issues, as well as support of programs that serve U.S. military families and veterans.

We.care, Western Digital's unique volunteer program, is at the heart of community support. It is the employees' valuable time, knowledge and experience, as well as compassionate touch that positively impacts the communities that are served through initiatives to teach, serve and clean.

Leveling the playing field in STEM education is critical. Volunteer programs are offered year-round for employees to engage with diverse groups of disadvantaged youth in meaningful ways. This summer, hundreds of employees across the company's U.S. sites assembled thousands of backpacks, equipping underserved students with the supplies necessary for a successful school year. In Orange County alone, Western Digital partnered with Orange County United Way to deliver five hundred backpacks to students in the Garden Grove School District.

From backpacks to products, Western Digital has the ability and commitment to make strides in narrowing the academic achievement gap. Recently, five thousand SanDisk® SD™ cards were donated to be loaded with educational content for students in remote communities in India. Students in areas without internet accessibility will now have the ability to benefit from the latest educational content through these SD cards. This initiative, like all of the company's philanthropic programs, leverages the same innovative thinking that elevates Western Digital's business success to educate and energize future engineers, business professionals and CEOs, all of who might not otherwise have had the opportunity to flourish and reach their full potential.

To unify the company's vast employee base around its philanthropic pillars, two global volunteer events are held annually. For the inaugural global volunteer event, focused around hunger relief, hundreds of employees packed more than a million nutritious meals, in just over a week's time. This year, that number is anticipated to be met and exceeded.

"The response to our inaugural global volunteer event was phenomenal," said Rosemary Krupp, Senior Director of Western Digital's We.care program. "From the factories to our corporate headquarters, employees around the globe gathered together to pack food for the hungry. Executives, operators and

managers all worked side by side with the common goal to help others. It was truly inspiring to witness the collaboration across the company."

The second annual global volunteer event, supporting environmental issues, coincides with Earth Day in the spring. Western Digital sites participate in a variety of volunteer activities with environmental themes. From planting trees, beach cleanups, clean water projects, to saving turtles, Western Digital employees roll up their sleeves to help protect and preserve the environment.

In the U.S., the company also supports programs assisting veterans and military families. Through community grants, Western Digital offers support to this important population by providing cash grants to related organizations. In addition, employees volunteer their time each year to help with various projects at the 9/11 Day of Service & Remembrance, sponsored by OneOC.

The team mindset, or the power of "We.," at Western Digital is a key ingredient in its success in business and volunteerism. This is why countless team volunteer activities are sponsored and organized by the Western Digital Foundation throughout the year. Employees are encouraged to bring forth the causes that mean the most to them and gather colleagues to support those organizations through volunteer activities.

When teams volunteer, they give their time to a good cause and gain lasting bonds with their colleagues.

In addition to engaging with the community through volunteerism, the Western Digital Foundation also provides community grants to nonprofit organizations and public schools in the regions where employees work and live. Selected through a competitive application process, grants are reviewed by an internal committee and awarded to programs aligned with the company's philanthropic focus areas.

As part of Western Digital's commitment to advance opportunities in education across the globe, the Western Digital Scholarship Program is due to launch later this year. The program will provide increased access to STEM education to underrepresented and underprivileged youth, and focus on supporting women and other minorities in achieving academic success. These scholarships will be awarded to eligible individuals who demonstrate promising potential and whose educational opportunities could be expanded by financial assistance.

Through all of these programs and initiatives, Western Digital aims to make a significant impact in helping this world: light the way to academic success for underserved and underprivileged youth, lessen the number of people who too often go without food, clean the air and waterways of our earth, and comfort families with loved ones serving in the U.S. military. The commitment from the company's senior leadership and passion from its employees make it all possible for Western Digital to help communities thrive—all because they really do care.

For more information, contact WesternDigitalFoundation@wdc.com, or visit [Corporate Philanthropy on wdc.com](http://CorporatePhilanthropy.wdc.com).

About Western Digital

Western Digital Corporation is an industry-leading provider of storage technologies and solutions that enable people to create, leverage, experience and preserve data. The company addresses ever-changing market needs by providing a full portfolio of compelling, high-quality storage solutions with customer-focused innovation, high efficiency, flexibility and speed. Our products are marketed under the HGST, SanDisk and WD brands to OEMs, distributors, resellers, cloud infrastructure providers and consumers. Western Digital, SanDisk and We.care are registered trademarks or trademarks of Western Digital Corporation or its affiliates in the U.S. and/or other countries. All other marks are the property of their respective owners.

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Give Your Employees Help When Needed: Disaster & Hardship Funds with OneOC

Establish your company's donor advised fund with OneOC.



Create a vision and guidelines for your donor advised fund.

Specify the source and amount of funding to be contributed to the fund.



Determine the types of financial needs and individuals that may be considered for assistance, & amount that may be granted.

Review the submitted personal statement of need forms to determine if they fit your company's established criteria.



Refer individuals to an existing 501c3 organization, such as *Helping Hands*, to verify need and create pre-approved assistance project for the individual. (Step may not be needed if Federally Qualified Disaster.)

Advise

your company's donor advised fund at OneOC to make a grant to *Helping Hands* for the individual's project. (Federally Qualified Disaster relief payments can be made to employees directly from the fund.)



LEARN MORE: contact Dan McQuaid at dmcquaid@OneOC.org or (714) 953-5757 x138.

Taking Care of Your Own: Company Disaster and Hardship Relief Programs

by Daniel McQuaid, President and CEO, OneOC

During the recent devastating hurricanes and fires, many companies and coworkers were unaware that they could do more than just "pass the hat" to give financial assistance directly to employees. Other companies also want to create a year-round program to help employees and their families facing other serious financial hardships.



McQuaid

Help for Employees Impacted by Federally Qualified Disasters

In response to the presidentially declared disasters in Texas, Florida, Puerto Rico, Napa and Sonoma, and Orange County, OneOC shared with its business partners that the IRS allows employers and their foundations to provide direct financial assistance to its employees. OneOC quoted IRS Publication 3833, "Qualified disaster relief payments from any source, including employers, reimbursing or paying individuals' specified expenses are not taxable income and not subject to employment taxes or withholding." OneOC also provided guidance on specific type of disaster related needs and required policies, procedures and documentation that must be in place prior to making relief payments.

Edwards Lifesciences, Foundation and Co-Workers Help Puerto Rico Employees

Edwards Lifesciences has employees impacted by Hurricane Maria in Puerto Rico who suffered significant damage to their homes and personal property. Some lost everything. Because Puerto Rico is a presidentially declared federal disaster, the Edwards Foundation, with additional tax deductible donations from coworkers, has been able to give direct financial relief to employees. Edwards CEO Mike Mussallem personally led a team of employees who brought basic supplies to coworkers in Puerto Rico and their facility's surrounding community.

Company Disaster Relief and Employee Hardship Funds

OneOC can help businesses of all sizes who would like to help their employees in response to a presidentially qualified disasters and also other natural disasters and employee financial hardships. By establishing a donor advised fund at an existing 501c3 organization like OneOC (see illustration), employers and coworkers can make tax-deductible contributions and employees can receive tax-free financial grants. A Company Disaster Relief and Employee Hardship Fund is quick and easy to set up, low cost, complies with IRS codes, and requires minimal internal administration.

Young's Market Helps Northern California Employee Fire Victims

The Underwood Family Foundation at Young's Market Company did not waste time launching their company Disaster Relief Fund at OneOC to raise donations for employees whose homes were burned or damaged by the fires in the wine country. In addition to voluntary contributions by employees, the Underwood family will make a significant donation to this fund. The company is also joining forces with several winery partners to help efforts to rebuild the area.

Pacific Dental Services Assist Florida and Texas Employees

Pacific Dental Services established a donor advised fund with OneOC to receive PDS Foundation grants and also company, coworkers, and business network tax deductible donations. Using a donor advised fund and an existing 501c3 organization makes it easy to assess employee specific needs, give personal grants in Texas and Florida, and provide financial reporting. Pacific Dental is also exploring expanding the use of their Disaster and Hardship Fund to support their employees and their families who are experiencing a hardship not related to a federally qualified disaster.

For more information, contact Dan McQuaid at dmcquaid@OneOC.org or (714) 953-5757 x138.

"We are providing support in the form of water, ice, food, supplies and cash grants from our foundation's disaster relief fund to ensure that Puerto Rico employees and their families have access to resources they need as the island recovers. We are also accepting donations from other Edwards employees to assist those who suffered the biggest losses."

- Mike Mussallem, Board Chair & CEO, Edwards Lifesciences



"The devastation in California wine country is personal for our company since we have many employees and winery partners who live and work in the impacted areas. The Young's family rallies together to help our colleagues in times of need. We're also joining forces with industry partners to raise funds that will be used in rebuilding efforts after the fires are fully contained."

- Chris Underwood, CEO, Young's Market Company

"I believe that companies that perform best over time build a social purpose into their operations that is as important as their economic purpose. Our social purpose is service to our employees and their families, as well as our communities both domestically and abroad. We especially want to support our team members when disasters strike and they're not sure where to turn."

- Stephen E. Thorne, IV, Founder & CEO, Pacific Dental Services



Corporate Citizenship Should Be a Priority Year-Round

Recently, I was asked how often KPMG contributes to the community. I had to stop to think about it, because like so many other businesses in Orange County we've tried to make volunteering and community giving a year-round priority. The simple fact is – our community, more than ever needs our support and helping hand.

All businesses in our community, small or large, owe it to our great city and neighbors to support our local non-profit and civic organizations that assist individuals and families that need them the most.

The act of giving has always been more meaningful and rewarding which makes volunteering and various fundraising efforts so special.

At the same time let's also remember that the needs won't disappear after any designated event, activity or holiday. It is our obligation to do what we can as business leaders to foster a culture and environment that encourages our greatest asset – our people – to use their time, talents and resources to support our communities where we live and work.

Indeed, giving of ourselves should be a "calendar free" act of goodness. It can be incredibly gratifying to know you've used your resources to make a difference and help others in need.

At some point in life, it could just as easily be our family, friends, or ourselves in need. It's so important to pay it forward. Getting to that mind-set takes time, commitment and a strategy that makes sense.

Two key ingredients to the strategy are giving employees time to volunteer, and allowing them to be engaged in determining where and how they and their employer should contribute to the community.

At KPMG, we provide our 550 Orange County employees at least 12 hours of paid time off to volunteer with an organization of their choice. Our volunteer program, INVOLVE, identifies needs within the community and organizes KPMG volunteers to serve those needs year-round. Employees can sign up for any of the proposed volunteer programs or volunteer on their own if they choose.

And while individual choice is important, we've also found that rallying employees around a couple of key causes makes a difference. For us that includes promoting childhood literacy. The KPMG Family for Literacy (KFFL) program

allows us to donate new books to a local elementary school or public library, and spend a day with school children participating in a variety of reading events.

Corporate giving in Orange County is significant, and our business community has always been generous, especially at this time of the year. Now is the time to re-energize your volunteer program and make a pledge to do more. Your employees will thank you, because volunteering can be among the most meaningful, memorable work they will do all year. And the benefits to the community in which we all live and work can last forever.



Mark Clemens

Mark Clemens is the managing partner of KPMG's Orange County office, and is responsible for the strategic direction and growth of KPMG's Orange County office, and support the development of 550 partners and professionals. As an audit partner, Mark has worked with various public and private companies over the years and currently focuses primarily in the technology industry. Mark is also an SEC reviewing partner, giving him responsibility for managing companies through the registration and periodic reporting requirements of the Securities and Exchange Commission. Mark is equally active in non-profit and community activities, having served for nine years as a board member of UCP of Orange County. In addition, he's a current board member of the Accountancy Advisory Board of the Charles W. Lamden School of Accountancy at San Diego State University, and a member of the Tocqueville Society with the United Way. Mark can be reached at 949.885.5400 or mclemens@kpmg.com.



Those who say the world can't be changed probably never tried



Student Leaders® recognizes those who lead and serve in their own communities and beyond. Bank of America will connect Student Leaders to tools and resources that will help them make communities better.

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In Good Company.



We are proud to be included alongside 49 other remarkable companies as a 2017 Civic 50 Orange County honoree. Our team invests both their time and money to build a stronger community.

The Opus Community Foundation was established concurrently with Opus Bank. Since its inception, the foundation awarded 210 grants to Orange County nonprofits that demonstrate an unwavering commitment to building a stronger community.

855.725.8518 | [OpusBank.com](https://www.OpusBank.com)

Dear Friends,

I am humbled by the Civic 50 Orange County award recognition. I view this award as one more incentive to continue our team efforts to apply our skills to improve our immediate community and set a standard of engagement to fellow companies. This award is also a testament to the principals of Orange County and the attention it gives to businesses doing good. We are deeply honored to be members of this tribe and part of the immediate family of businesses working here.

We also want to thank our impact partners: Habitat for Humanity of Orange County, Alzheimer's Orange County and Ronald McDonald House Orange County for the work they do and the ways they have facilitated our involvement. These organizations, and the many others with whom we partner, have helped so many people and found fulfillment in doing good. It is important that we acknowledge and appreciate the work they do.

In 2009, we committed to providing roof installations for all Habitat for Humanity Orange County builds. This past year, Antis employees donated more than 700 hours of labor to install roofs as part of this company pact, and we hosted three Habitat Team Builds for additional volunteers.

Whether it's putting roofs on homes or supporting the community through traditional giving, we believe in showing up to help. Our company culture stems from our commitment to this community, and this will never change. Because of the buy-in of my whole team, we are able, as a company, to show generosity with all of our stakeholders. They make all of this possible! I am proud of their hard work, dedication and humility – they take my vision and make it a reality. I cannot thank them enough.

Sincerely,

Charles Antis
 Founder & CEO
 Antis Roofing & Waterproofing



For more information about Antis, contact Cori Vernam at cori@antisroofing.com or call 949.461.9222.



For a dollar, you can give her
 breakfast, lunch and dinner.

Not to mention a childhood.

No child should have to worry about where her next meal is coming from. Which is why you can make a big difference for very little money. At Second Harvest, 90 cents of every dollar goes directly to feeding the hungry—and a dollar will buy three whole meals. Help us meet our Bold Goal of making sure no one in Orange County goes to bed hungry. Ever. Learn how at FeedOC.org.



OC's Hungry at Risk of More Than Missing Meals

Ever wonder why more than 315,000 people in Orange County will need to look to Second Harvest Food Bank for food assistance this month? For the working families, seniors, veterans and others with disabilities who make up the majority of our clients, it's the cost of living, plain and simple. Average rents in OC have risen 34% since 2011, and in 2017 the average rent for a 2-bedroom apartment in OC rose to a whopping \$2,389.

With every price jump more of our clients tell us that affordable living spaces are out of their reach and they just can't cover all the basics like rent, utilities, transportation, and medical expenses. Unfortunately, that also means that many of them are only one medical emergency or car repair away from eviction and homelessness.

To keep a roof over their heads and cope with rising prices, our clients use many different strategies like:

- ▶ Skipping meals so their kids don't go to bed hungry
- ▶ Watering down their food to make it go farther
- ▶ Buying unhealthy, less expensive food which can lead to obesity and chronic health problems like heart disease, diabetes and more

Mary, an octogenarian who lives alone, told us that at end of every month she would split her meals to have enough for breakfast, lunch and dinner. With the food she received she was able to eat well again and even had some left over to stock her pantry. Another senior, Willa, told us emphatically that if it weren't for the food she got at her senior center, she wouldn't have survived.

Last year, Second Harvest distributed 21.6 million meals for the hungry in our community. But we need to do more because we aren't able to help everyone who needs food. Our Bold Goal is to provide 30 million meals by 2021. But to do that, we'll need your help.

For every \$1 you donate, we can provide 3 meals to the hungry. And more than 90 cents of every dollar we spend goes to feeding the hungry and changing lives for the better.

For more information about how you can help us end hunger in Orange County, go to our website, FeedOC.org or call 949.653.2900.





Make a Meaningful Difference for Orange County Veterans!

They left their families and loved ones behind to serve our nation and protect our freedom. Many made the ultimate sacrifice. Now we have the privilege of serving them.

Orange County Real Estate Luncheon – Thursday, April 19, 2018

Top real estate companies and financial institutions from Orange County, in partnership with the Orange County Community Foundation, are coming together once again in a continuing effort to make an **Impact** and **Benefit** the nearly **130,000 Veterans** living in our community. In its first 2 years the OC Real Estate Luncheon raised over **\$1.3 million** to address the critical needs of returning military focusing on **HEALTH, EDUCATION** and **EMPLOYMENT**.

Proceeds from the first two luncheons were granted by a panel of top Orange County business executives and military advisors to 15 OC veterans organizations that demonstrated measurable results and superior financial transparency. And we're making a difference.

Through the efforts of the OCCF Veterans Initiative and the OC Real Estate Luncheon significant collaborations are occurring between veterans organizations across the county helping our veterans to connect to a community of peers and services.

Please join us Thursday, April 19, 2018 at the Hotel Irvine for the 3rd Annual OC Real Estate Luncheon. **Let's continue to work together in support of our OC Veterans and in recognition of their service to our nation.**

For more information on the OC Real Estate Luncheon please contact ocreluncheon@dsrg.com.



To reserve your seats, please contact Mission Hospital Foundation at 949.364.4225 or christy.welch@stjoe.org.



Mission Hospital thanks
LUGANO
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and Idit & Moti Ferder for their gracious sponsorship of the Holiday Gala. Your partnership and Spirit of Giving is treasured.



Life Without Limits for Children With Disabilities

At UCP of Orange County (UCP-OC), we help children with disabilities reach their full potential. Through our six programs, we work with children and families to improve their quality of life and live a life without limits.

Founded in 1953, UCP-OC was originally established as United Cerebral Palsy of Orange County to assist people of all ages affected by cerebral palsy. Over our 60+ years of service, we have observed great demand for services for children with disabilities, including cerebral palsy, but also autism spectrum disorder, Down syndrome, and other developmental delays. In response, we now focus our efforts on children, while broadening the programs offered and the range of disabilities served.

With a broader spectrum of programs and services offered to children with a wide range of disabilities, it was decided to evolve to UCP of Orange County, or UCP-OC, for short. Our new name preserves our deep-rooted 64-year heritage, while helping the community understand our dedication to helping all children with developmental delays or disabilities reach their full potential.

Not only has our name evolved, but so has our identity. As part of our new look, you'll notice that some of the children and families we serve have chosen to be a part of our 2017 awareness and fundraising campaigns. The spirit, hope, and commitment that our families have inspired all UCP-OC campaign communications.



Every day at UCP-OC, we are humbled to receive thanks from the families we have the privilege of serving. The 5,392 children and families of UCP-OC are coping daily with the challenges that come from having a child with disabilities, like mounting medical bills, or fears of whether or not their child will be able to walk, speak, and grow into an independent individual. Despite those stresses, they continually share their appreciation for what we provide to their family as a whole.

Every year, UCP-OC provides:
 16,352 therapy sessions
 3,543 in-home early intervention visits
 554 recreation opportunities
 5,392 children and family members served
 105,455 hours of respite and inclusive childcare

It is our privilege to serve and be a part of the families of UCP-OC. The courage they possess in life's most difficult times encourages and pushes us to grow and improve year after year to meet the needs of each family.

To get involved with UCP-OC, or if you have questions, comments, or ideas you would like to share, please contact Elizabeth Beas, Director of Development, at ebeas@ucpoc.org or 949.333.6452.

For more information, check out our new website at www.ucpoc.org.





Life without limits

for kids with disabilities™

At UCP-OC, we help children with disabilities reach their full potential. Through our six programs, we work with children and families to improve their quality of life and live a life without limits.

To hear Carter's story or donate, visit our new website at ucpoc.org/Carter





Engage Civically. Plan Intelligently. Impact Bigly.

You think deeply about things that matter to you. You are strategic about your business. You are thoughtful about your family. You are intentional about your friendships. Why should your philanthropy be any different?

Your charitable giving is your way to make a positive impact on the world. In order to maximize that impact, you deserve to get the most *“bang for your buck.”*

At Ersoylu Consulting, **philanthropy is our business**. We are data-driven *“do-gooders”* who exist to help make your charitable work simple and impactful. **Let us do the heavy lifting for you.** Whether you are a foundation executive looking to research best practices before diving into a new portfolio, a corporate CSR

manager looking to survey your staff about their interests in volunteerism or plan a new initiative, or a wealth manager seeking value alignment between your clients and diverse philanthropic options, we are here to help. We combine data and analytics with deep community-based knowledge to ensure your story of philanthropy is one of impact and sustainability.

Our team brings tools and analytics from decades of experience in the research, social science and nonprofit sector to help you be thoughtful and strategic about how you engage in philanthropy.

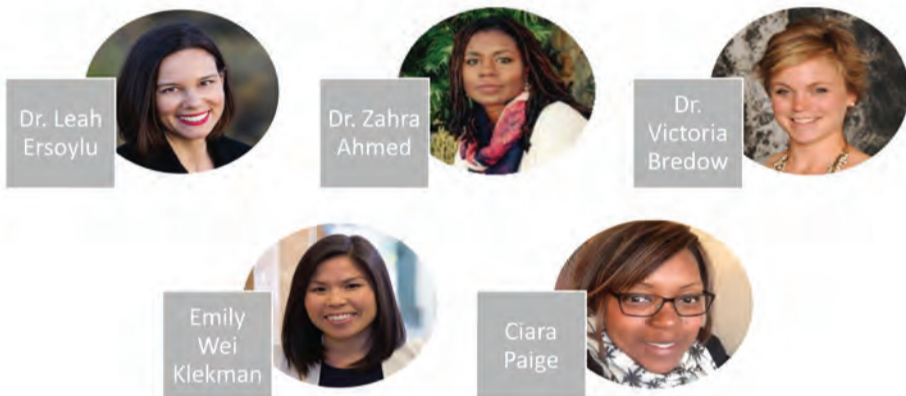
We know that there are countless ways to make a difference. We understand you are a unique, dynamic organization with very particular needs. As a result, we remain client-focused as we tailor solutions to meet you where you are.

Let us help you find what works best for you today. Learn more at ersoylu.com.

TIPS TO DO GOOD

1. Research causes that align with your *values*. Make a list of the interests and values that mean the most to you. Then, explore these with relevant nonprofits.
2. Be clear about your view of *how change happens*. Do you think it happens slow or fast? Do you want to support programs or tackle root causes through policy and systemic changes?
3. Know that *metrics matter*. Social good can, and should, be measured. Don't observe just what organizations do—measure the impact they make.
4. Know what you want to be accountable for. Do you want to invest your time, your influence, your money or some combination thereof?

OUR ERSOYLU TEAM



Please Join Us in Honoring Orange County's Top Philanthropists

Last Call for EARLY BIRD registration rate—reserve your seats by 10/4.

National Philanthropy Day Luncheon

celebrating
passion for a cause

Thursday
November 16, 2017

10:30 a.m. - 1:30 p.m.
City National Grove of Anaheim
Honorary Chairs: Elizabeth & Thomas Tierney

Outstanding Philanthropists
SUZANNE AND JAMES MELLOR

Outstanding Philanthropic Group
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ORANGE COUNTY UNITED WAY

Outstanding Founders
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ILLUMINATION FOUNDATION

Outstanding Volunteer Fundraiser
ANNE SHIH

Outstanding Large Corporation or Business
THE CAPITAL GROUP COMPANIES

Outstanding Mid-Size Corporation or Business
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GRACE CROSS



Produced by the Association of Fundraising Professionals, Orange County

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What to Consider When Choosing a Corporate Philanthropic Partner

Many leading Orange County companies are UNITED4OC

Businesses form alliances to gain and sustain a competitive edge. The right relationships magnify strengths, energize workers and enhance overall performance.

Increasingly, companies seek non-profit partnerships for the same strategic benefits to positively impact the community and align with their business's values and vision. Executives see how joining forces with non-profits can help them reach philanthropic goals by providing key expertise and resources.

What's more, according to Fortune.com, even though charitable acts are performed without the expectation of a return, they are not without their own rewards. For instance, in the competitive Orange County job market, providing a differentiator matters to many applicants. Companies that engage in public service and volunteerism may have an edge in recruitment—especially with millennials.

Finding a Cause That Connects

Choosing an issue your employees can rally around is critical. Ideally, it's broad enough to spark the enthusiasm of the majority of your personnel. At the same time, the mission should be personal enough to touch their hearts and make them feel good about helping.

The type of involvement you're looking for and the scope of the impact you wish to have are also considerations. Do you want opportunities for community service plus opportunities to give funds? Offering choices, such as a local service day for all employees as well as individual volunteer opportunities, can increase engagement.

Exploring Opportunities to Help

Many of Orange County's serious issues are hidden from daily view. Others are more visible.

- ▶ Nearly 1,000 children live in motels and more than 1,200 live in shelters
- ▶ 1 in 4 Orange County residents (800,000 people) live below the poverty level
- ▶ Over one-third of children are overweight or obese
- ▶ More than 2,300 high school students drop out each year
- ▶ Only 49% of high school graduates in Orange County are college eligible

These challenges, and other hardships faced by local children and families, present a multitude of options for uniting your corporate team around a philanthropic cause.

Making Your Selection

As you assess these factors—your business goals, how a philanthropic program could enhance employee experiences, the cause and the needs of our community—you may finally want to consider the services offered by potential partners.

Depending on your staffing and resources, it could be beneficial to choose a partner that will help develop your program and assist with implementation. Even better if the partner will customize the program based on your company's interests, size, calendar and other unique requirements.

More Than 345 OC Companies Have Chosen Orange County United Way

Orange County United Way's compelling mission has made it the choice for hundreds of Orange County's leading businesses.

Today's United Way fights for the Education, Health, Housing and Financial Stability of every person in Orange County. Our community's problems are complex and interconnected. For substantial and sustainable change, we must tackle all four of these issues. We can't focus on education for a child who is hungry and who doesn't have a home. In Orange County, finding a job doesn't always mean a parent will have the income needed to support a family.

When you and your employees join Orange County United Way's fight, you're contributing toward a holistic, long-term solution for our community.

Flexible, One-Stop Program Development and Implementation

We have a team dedicated to making social impact programming easy! We work with you to develop a custom plan to meet the needs of your company—and our community. Special requests or creative ideas? We are ready to make them a reality.

With Orange County United Way, your plan might include:

Employees engagement activities, such as

- ▶ Sponsoring a Healthy Day of Action, running relays and serving a nutritious lunch to neighborhood children
- ▶ Mentoring students or hosting high school juniors and seniors for a company tour
- ▶ Offering prizes to promote awareness and recognize employee participation at corporate functions
- ▶ Hosting a Lunch and Learn where co-workers are educated and inspired to join our fight

Energizing team spirit and volunteer opportunities, like

- ▶ Packing "welcome home" baskets with personal care items and delivering them to a local women's shelter
- ▶ Reading with a first grader for 30 minutes each week online via a unique virtual platform
- ▶ Team challenges and corporate matches to make giving programs more exciting
- ▶ Engaging employees through affinity groups and giving circle that let them network with like-minded professionals



When your company joins our fight, you join other Orange County businesses who are looking beyond short-term contributions. More than just a fundraising organization,

"Today's United Way," explains CEO Susan B. Parks, "is a vital philanthropic partner for Orange County companies looking for ways to maximize purpose and actualize the social responsibility culture they and their employees' desire."

Automobile Club of Southern California is an outstanding example. The company makes a significant impact through donations, employee volunteer services and other vital contributions. This year, they raised approximately \$500,000 in addition to performing service. Wendy Nugent, Senior Human Resources Consultant and United Way Campaign Manager for Auto Club, explains, "The Auto Club believes in giving back to the communities where it operates, so it's a natural partnership to help Orange County United Way with all it's doing to improve lives."

Year-round volunteerism is a hallmark of the partnership with Ernst & Young. EY Connect Day found them at Savanna High School conducting mock interviews and building resumes with students. Workplace giving contributed over \$300,000 to our community last year, and the firm has the most Tocqueville Society members (individuals donating \$10,000 or more) of any Orange County United Way partner. "We are UNITED4OC to make a long-term difference in the lives of our local children and families," stated Peter Zofrea of EY.

UPS, Nationwide, Fluor, KPMG, Edwards Lifesciences, Johnson & Johnson and Pacific Life Insurance are just a few of the many other partners who are contributing to our community while furthering their own corporate missions.

Join Us


To make change, we must band together and fight. UNITED4OC is rallying Orange County's most dedicated businesses and individuals around the four challenges that matter most to our community.

Alongside the strategic benefits for your company, you have the opportunity to make a difference in the lives of adults and children right here in Orange County, which will make a difference for every one of us. With your help, we can turn this fight into a win.

For more information, visit UnitedWayOC.org, or contact Orange County United's Team at info@UnitedWayOC.org or 949.660.7600.



THE NEXT ACT CAPITAL CAMPAIGN

Segerstrom 
Center for the Arts

OVER 450 WORLD-CLASS PERFORMANCES EACH YEAR ARE JUST THE BEGINNING
COMMUNITY ENGAGEMENT AND EDUCATION PROGRAMS REACH MORE THAN 350,000 CHILDREN AND FAMILIES ANNUALLY

The bold and ambitious initiatives made possible by the **Next Act Campaign** will transform Segerstrom Center into a fully inclusive cultural and civic resource, unique nationwide, that excels artistically, while responding impactfully to the dramatically changing needs of our diverse community in Orange County. These transformational initiatives include:

- **JULIANNE AND GEORGE ARGYROS PLAZA** will be a welcoming public gathering place with a year-round calendar of **free** programming, community events and family activities that celebrate the wonderful diversity of Orange County. Plaza amenities include a lively café, shaded picnic areas, state-of-the-art sound system, and free WiFi.
- **CENTER FOR DANCE AND INNOVATION** offers wide-ranging programs to expand audiences, engage underserved populations, and ensure access by all for the Center's artistic, educational and training programs. A new **School of Dance and Music for Children with Disabilities**, technology-based "**ActiveSpace**," the highly-regarded **American Ballet Theatre William J. Gillespie School**, and need-based scholarships are among its programs.
- **CENTER WITHOUT BOUNDARIES** establishes pioneering partnerships with non-cultural institutions to assist them with meeting the rapidly changing needs of our diverse county. Current community partners include: Canine Companions for Independence, CASA, Camp Pendleton, CHOC, Alzheimer's Orange County, United Cerebral Palsy, among others.



GRAND
OPENING:
October 28 at 11am

FREE MUSIC, DANCE AND FUN
FOR THE ENTIRE FAMILY!

Julianne and George
Argyros Plaza

Center for Dance
and Innovation



SEGERSTROM CENTER FOR THE ARTS APPLAUDS THE FOLLOWING SUPPORTERS WHO GRACIOUSLY CONTRIBUTED TO THE NEXT ACT CAPITAL CAMPAIGN:

ANONYMOUS
MR. AND MRS. ANTHONY ALLEN
ALAN AND ANNE ANON
JULIANNE AND GEORGE ARGYROS
BANK OF AMERICA
BEALL FAMILY FOUNDATION
MR. AND MRS. BENTON BEJACH
MARTA AND RAJ BHATHAL
DEBORAH AND LARRY J. BRIDGES
MR. AND MRS. IRVING X. BURG*
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JOHN AND TONI GINGER
RICHARD AND VIRGINIA HUNSAKER

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THE SAMUELI FOUNDATION
JACKIE SINGER AND JOHN POPE
SUSAN M. AND TIMOTHY L. STRADER FAMILY
PETER AND MARY TENNYSON
CAROL AND KENT WILKEN
FRITZIE WILLIAMS*
U.S. BANK

* Deceased

Next Act Campaign donors listed as of October 9, 2017

Join us to ensure Segerstrom Center for the Arts sets a new standard of community engagement that equals its commitment to artistic achievement. There are additional naming opportunities available. All support is greatly appreciated. To help us complete the Next Act Capital Campaign, please contact **Nicole Balsamo, Executive Vice President of External Affairs at (714) 556-2122 ext. 4269, email: NBalsamo@SCFTA.org or visit SCFTA.org/NextAct.**

*Creating a
legacy is hard.*

*Leaving one,
even harder.*

We know, because we know you well.

Knowing our clients well gives us the insight to help with their wealth — and their lives. Through strategic philanthropy, we transform family wealth into an enduring legacy. Find out how strong relationships lead to 95% client satisfaction.



BNY MELLON
WEALTH MANAGEMENT

Carla L. Furuno | Regional President — Newport Beach | 949-253-5071
bnymellonwealth.com | [@BNYMellonWealth](https://twitter.com/BNYMellonWealth)



BNY MELLON WEALTH MANAGEMENT

A Client-First Culture

BNY Mellon has been managing wealth since America began creating it, providing an unparalleled level of service to private clients, family offices, institutions and endowments alike. We'd like to do the same for you.

BNY Mellon Wealth Management clients represent some of the most successful individuals, families and institutions around the world. They often come to us for our results and reputation. But it's our ability to deliver our capabilities consistently and individually that has brought us the success that matters most — a circle of loyal and highly satisfied clients whose strong relationships stretch across market cycles and generations.

In our Newport Beach office, more than 70 of the office's top 100 clients are former business owners who turned to us for transition planning. Our team holds numerous advanced financial planning degrees, with specializations in tax, estate, investment, divorce and business transition/exit planning.

Nationally Recognized Leader

- Among nation's largest wealth managers
- A national leader in family office services
- Approximately \$216 billion in private client assets¹

Experienced, Dedicated Wealth Manager

- Heritage of managing wealth for more than 230 years
- First to create and manage a trust in the U.S.
- Sustained history of financial leadership and innovation
- Investment organization dedicated solely to wealth management clients

Comprehensive, Expert Capabilities

- Proven strategic architecture and asset allocation expertise
- Deep investment capabilities across asset classes and specialties
- Expert, time-tested fiduciary, wealth protection and transfer, philanthropy, asset-specific analysis, estate settlement and family governance resources
- Innovative banking, credit, mortgage and brokerage capabilities
- Industry-leading technology, reporting and safekeeping capabilities

Client Focus

- Extensive network of offices in 18 states and 4 countries
- Highly personalized strategies and service
- Industry-leading client satisfaction and retention rates



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¹As of 6/30/2017

Invest in the Health of Your Employees With the American Heart Association

Cardiovascular diseases have an impact on our families, communities and businesses. That impact is physical and emotional, but it's also financial. The reality is that cardiovascular disease accounts for more deaths than all forms of cancer combined, and stroke is America's #5 cause of death and leading cause of long-term disability. Numbers like this tell us that no one is exempt – we are all affected.

As corporate leaders in Orange County, you may struggle with many of the same things: rising healthcare costs, a physically inactive work force, and reductions in employee productivity and motivation. Heart disease is a company's number one health threat.

- ▶ 60% of CEOs cite healthcare as their number one cost pressure
- ▶ Companies lose \$312 billion every year due to employees fighting heart disease and stroke
- ▶ And here is the really important point for business leaders like you: the cost of treating heart disease and stroke is expected to *TRIPLE* in the next 20 years.

Some of you may already have been seeing this in employees who miss work for major interventions like surgery or who need expensive, long-term therapy for preventable conditions like high blood pressure. If we don't do something about this, on a large scale, cardiovascular disease will affect companies for the worse.

As leaders, your job is the bottom line—whether that is financial security for your customers, selling a product, meeting the needs of a patient or building things — but it's also to help your employees make a connection to help them feel fulfilled.

That's why today it is more important than ever to invest in your employees' health and sense of purpose. A great way to show this is by participating in American Heart Association events and programs. Each year, the American Heart Association relies on people from companies and industries just like yours to help us build healthier lives, free of cardiovascular diseases and stroke.

There are many ways you and your employees can become involved with the American Heart Association, such as participating in a local event:

- ▶ Go Red For Women Luncheon on February 16, 2018
- ▶ Orange County Heart Walk on March 24, 2018
- ▶ Heart Ball on October 13, 2018

With a healthier, community-involved workforce comes happier employees, improved morale, and increased productivity leading to lower healthcare costs.

Protect your most important asset – your employees. With our combined efforts, we can truly make a positive impact on the health of your employees and our community. Because of our great leaders like you, we have been able to move the needle in funding \$1.6 million for research projects here in Orange County. And that, is purpose.



Upcoming American Heart Association Events and Volunteer Opportunities

Each year, the American Heart Association relies on people just like you to help us in building healthier lives, free of cardiovascular diseases and stroke.

There are many ways you can become involved with the American Heart Association, such as:

- ▶ Participating in a local event
- ▶ Volunteering to help in your local office with mailings, stuffing, filing, data entry
- ▶ Becoming an advocate by contacting your legislator on important American Heart Association issues
- ▶ Talking to your child's school about heart healthy programs
- ▶ Having your employees participate in work-site wellness programs

You can make a difference in building healthier lives, free of cardiovascular diseases and stroke in our own community! If you are interested in volunteering with the American Heart Association in Orange County, please contact Shana Neuberger at shana.neuberger@heart.org or call 949.856.3555. We will be happy to assist you.

On behalf of



Orange County Division

*we would like
to congratulate*

all of Orange County's Civic 50
awardees for 2017! We appreciate
your efforts to improve the quality
of life in our community.

Upcoming Signature Events



GO RED FOR WOMEN LUNCHEON
Friday, February 16, 2018
Hotel Irvine
17900 Jamboree Road
Irvine CA 92614
Ocgored.heart.org



HEART & STROKE WALK
Saturday, March 24, 2018
Angels Stadium
2000 E Gene Autry Way
Anaheim, CA 92806
OCHearWalk.org



HEART & STROKE BALL
Saturday, October 13, 2018
Balboa Bay Resort
1221 West Coast Highway
Newport Beach, CA 92663
HeartBallOC.Heart.org

For more information,
please contact Shana Neuberger at
Shana.Neuberger@heart.org
or 949.885.1519

Innovation@TVT

21st Century Learning

Celebrating 25 years of educational excellence, TVT Community Day School (TVT) is a leading TK-12 college preparatory school rooted in Jewish values. TVT provides a dual curriculum with enriched programs and Jewish Studies to prepare students to become compassionate citizens and global leaders.

Innovation@TVT (I@TVT) is a comprehensive program to ensure we prepare our students for the challenges of the 21st century. I@TVT engages students in a rigorous learning experience with extraordinary math, science, engineering and arts curriculum; exceptional faculty; and state-of-the-art facilities.

Cutting-Edge Curriculum

At the heart of I@TVT is a challenging academic program designed to break down barriers between disciplines utilizing project-based learning, technology, and interdisciplinary strategies to allow students to learn by doing.

TVT offers rigorous curriculum such as **Singapore Math** for grades K-5; **BEAST Academy** and the **Art of Problem Solving (AoPS)**; and **Amplify Science**, a K-5 curriculum developed at University of California Berkeley. The **Engineers in Training** program begins with pre-engineering courses in 6th grade, and a four-year engineering sequence for grades 9-12. Special classes are offered in coding and robotics, game design, space and rocketry, and drone racing.

TVT's **Visual and Performing Arts Department** provides students the ability to marry ideas to action. Whether learning to dance, play music, make a film or paint, the discipline of taking an idea to its artistic conclusion is paramount. Throughout the year, TVT provides multiple showcases for students to present their work including the annual TVT Southern California High School Film Festival, where young creators compete against thousands of other films entered throughout the country.

State-of-the-Art Facilities

With the recent completion of its 21st Century Campus Project, TVT students have access to the most innovative learning spaces in Orange County. Designed and built by award-winning firms LPA and DPR, the new facilities house engineering and fabrication labs, a design studio, a media center, a film studio, and visual art rooms.



This investment in the future of learning represents our commitment to preparing TVT students for the complexities of life to be effective in the 21st century. Technology-enhanced classrooms nurture collaboration, creativity, critical thinking, and playful learning. Our school has been carefully re-designed to generate an environment where students express themselves as scientists, programmers, writers, musicians, engineers, entrepreneurs, dancers, film-makers, and game designers.

Exceptional Character

At TVT, good character is as important as strong intellect, so we interweave both, cultivating students' ethical values in concert with our academic program. Our curriculum is imbued with service learning and immersion projects to gain hands-on experience by helping others. From building a medical facility in Tanzania to biomedical research at UC Irvine Medical Center, TVT students graduate as confident leaders with a desire to make the world a better place.

Visit TVT

Graduates of TVT earn acceptance at top universities at up to three times the national rate, and high school students' ACT scores are superb. We invite you to visit our beautiful campus. Contact Admissions: 949.509.9500 / admissions@tarbut.com or visit TARBUT.com.



ARNOLD SHAPIRO ARTS & TECHNOLOGY CENTER | Middle & Upper School



SHEILA & ERIC SAMSON & FAMILY INNOVATION CENTER | Lower School

21ST CENTURY LEARNING



TVT is one of America's leading TK-12 college preparatory schools rooted in Jewish values. We are committed to investing in our children's future. Innovation@TVT provides exceptional faculty, state-of-the-art facilities, and cutting edge curricula designed to break down barriers between disciplines utilizing project-based learning, technology and interdisciplinary strategies to foster science, technology, engineering, arts and math.

- Engineering and fabrication labs
- Design studios
- Media center
- Film studio
- Visual art rooms
- Technology enhanced classrooms

ADMISSIONS OPEN HOUSE
TK-12
 Please join us on November 9, 2017
 949.509.9500 | TARBUT.com
 5 Federation Way | Irvine, CA 92603

Designed by award winning firms





Together, We Are Changing California's Future

More than 2 million K-12 students in California are not proficient in math or English. A third of all California students, these kids are struggling to keep up with their peers. Without additional support, they will fall further behind and their dreams for a better future will become even more difficult to achieve.

This is where Think Together comes in. We partner with schools across California to provide over 150,000 students with access to high-quality educational opportunities during and outside the school day. Our programs give kids critical academic support and life skills that propel them to excel in school.

Jesse, a middle school student in Redlands, was able to improve his GPA from below a 1.0 to a 3.23. He now proudly shows off his report card and credits Think Together's afterschool instructors for the dramatic turnaround. Confident in the progress he has made, Jesse is dreaming of becoming a lawyer one day.

Kids are not the only ones needing additional help. Eight out of ten California school districts are not adequately preparing their students to meet the state's learning standards in Math. Six out of ten fail to do so in English. Think Together also empowers adults, from the boardroom to the classroom, with the tools and strategies to accelerate learning for all students.

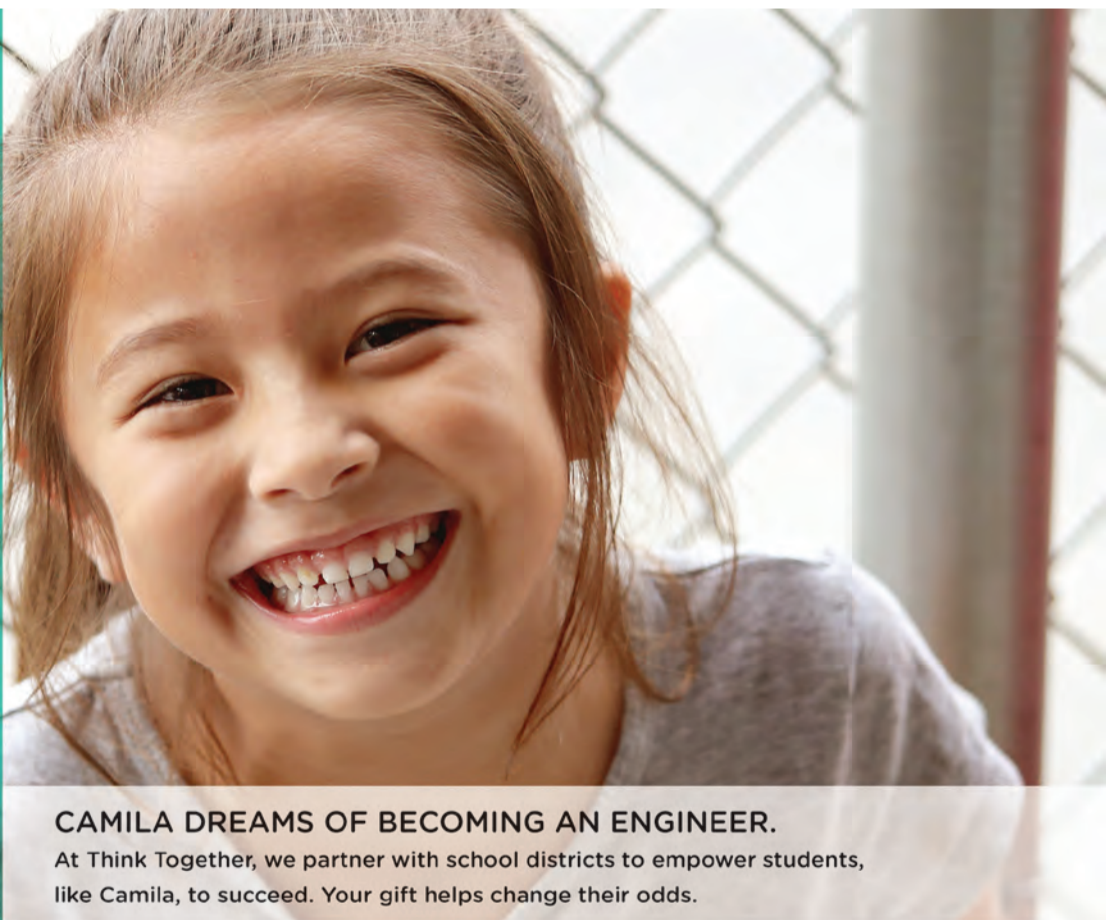
Our programs are possible because of generous philanthropic support. Together, we are changing the odds for millions of California's students by ensuring they have an opportunity to realize their potential, excel in school, and beat the odds.



Jesse improved his GPA from below a 1.0 to a 3.23

WE INVITE YOU TO LEARN MORE ABOUT OUR WORK AND BECOME AN ODDS-CHANGER AT THINKTOGETHER.ORG.

714.543.3807
info@thinktogether.org
thinktogether.org



CAMILA DREAMS OF BECOMING AN ENGINEER.
 At Think Together, we partner with school districts to empower students, like Camila, to succeed. Your gift helps change their odds.

CONSIDER MAKING A GIFT TODAY AT thinktogether.org/donate

Think Together is a nonprofit organization, headquartered in Orange County, providing over 150,000 students high-quality expanded learning programs.



Play Days Help Amplify the Power of Play to Bring Out the Best in Every Kid!

Engage your team. Playworks wants to help you turn your employees into community builders. Trained staff facilitate volunteer engagements ranging from Play Days and playspace transformations in local schools to corporate recess in offices and corporate kickball. Staff train, support, and empower your employees to make an impact in our community while also having a great time together.

Corporate Play Day and Playspace Transformations

Playworks Corporate Play Day is a fun and active team-building, volunteer, and community engagement experience that gets your employees directly serving children in low-income schools. Facilitated by the staff of Playworks, the national leader in engaged play, Corporate Play Day engages your employees in games that foster collaboration, teamwork, and flexible conflict resolution—skills as vital for children at school as they are for adults in work.

After learning Playworks' games, attention-getters, and conflict resolution strategies, employees fan out on the playgrounds and assist the Playworks coach in facilitating recess games. Employees will experience the transformative power of positive play—both for themselves and the kids they meet.



in schools during and after the regular school day. Studies and surveys show that when Playworks partners with a school, kids are more physically active, experience a greater sense of safety and belonging, and return to the classroom after recess with a measurably improved capacity to focus and be ready to learn.

Interested in learning more? Please visit playworks.org/play-days or call 310.822.4176

“It was a wonderful way to bring our people together to work with an organization that really is having an impact on kids and their future.”
- Susan Stone, PwC Geographic Marketing and Corporate Responsibility Leader



Corporate Recess

Certified trainers provide one-hour to all day workshops at your office or off-site location. Corporate Recess breaks the ice with fun games, teaches effective communication skills through energized activities, and develops strategic thinking skills through teamwork and communication.

Corporate Kickball

Play in our annual corporate kickball tournament! Teams from DPR Construction, PricewaterhouseCoopers LLP and others engage in healthy competition, give out high fives, and kick for a cause.

Playworks is the leading national nonprofit supporting children's academic and social learning by providing safe, healthy, and inclusive play and physical activity

Congratulations to our partners and honorees who are amplifying the power of play!
Capital Group
Cox Communications
Disneyland Resort
DPR Construction
Kaiser Permanente
Mazda North American Operations
PIMCO
PricewaterhouseCoopers LLP

PLAYWORKS

From classmate To teammate

TAKING TURNS

Learn. Donate. Volunteer.

Visit playworks.org/socal or call 310.822.4176 to engage your employees in play.

Next Act Capital Campaign

“The Center’s Next Act is ambitious and bold. Its innovative programs will transform the Center into a fully inclusive artistic, educational and civic resource, unique nationwide, that excels artistically while responding meaningfully to the changing needs of our wonderfully diverse community. The result will be even more dynamic performances on our stages complemented by innovative, community-focused initiatives that will contribute in dynamic ways to the future of Orange County.”

– Terrence W. Dwyer, President,
Segerstrom Center for the Arts

Segerstrom Center’s Next Act Campaign makes possible groundbreaking and transformative initiatives that will support access by all to Center programs and will encourage communities to connect culturally and share a sense of optimism about the future.

We encourage you to consider what part you will play in helping realize these bold initiatives that will contribute so significantly to the social, cultural and economic future of Orange County. These initiatives include: the **Julianne and George Argyros Plaza**, the **Center for Dance and Innovation**, and the **Center Without Boundaries**.

Julianne and George Argyros Plaza

The *Julianne and George Argyros Plaza* will be a welcoming and fully inclusive public gathering place with a year-round calendar of **free** dance and music programming, community events and family activities that celebrate the wonderful diversity of Orange County. Plaza amenities will include our new café, Center 360, and shaded picnic areas. The Argyros Plaza will integrate advanced technological features, including state-of-the-art sound and lighting systems, plus free WiFi.

Plaza programs will ensure access for all to a variety of performances and events that celebrate our community’s diverse cultural traditions, including an International Holiday Series featuring the Mexican celebration, Dia de los Reyes (Three Kings Day); Chinese Lunar New Year; and a Persian Nowruz Festival.

Center for Dance and Innovation

The *Center for Dance and Innovation* (CDI) offers a wide range of programs to expand audiences, engage underserved and vulnerable populations, and to ensure access by all for the Center’s artistic, educational and training programs. The CDI is home to the School of Dance and Music for Children with Disabilities, internet-based community engagement initiatives, American Ballet Theatre William J. Gillespie School, and the Judy Morr Theater. CDI studios are also used for dance training classes, summer dance programs, and community events for all Orange County residents.

A new *School of Dance and Music for Children with Disabilities* offers classes that are fully inclusive and designed for children with cerebral palsy, autism spectrum disorders, audio and visual impairments and other complex needs. Nearly 250 children are currently participating, and the school expects to serve more than 400



students annually within the next two years. The children can enjoy dance and music while developing key skills that include balance and coordination, communication, and gaining self-confidence. Parents are delighted that their children have this opportunity. **“Thank you for everything!”** says Cathy Tiquia. **“As the mother of a 6-year-old with Down syndrome, I LOVE that you thought of doing something like this! Music, dance, and art offer a medium for special-needs children to express themselves more easily.”**

The nationally acclaimed *American Ballet Theatre William J. Gillespie School* offers classes for pre-primary through



pre-professional levels (ages 3-18). Using ABT’s National Training Curriculum, the school’s structure promotes creativity and discipline, encouraging students to reach their highest potential. The school has a strong need-based scholarship program ensuring access by underserved communities to its renowned training.

“ActiveSpace,” one of our community engagement initiatives, provides an interactive environment in which dancers and choreographers can experiment by incorporating innovative technology into the dance process, with its workshops viewed by both audiences in the theater as well as thousands more participating through live-streaming on Facebook Live.

Segerstrom
Center for the Arts



Center Without Boundaries

The Center has taken a leadership role in how the arts can help serve, connect and contribute to the most underserved, vulnerable and at-risk communities throughout Southern California. The *Center Without Boundaries* features pioneering partnerships with non-cultural institutions to support their efforts to meet the rapidly changing needs of our many diverse communities. Current partners include:

Canine Companions for Independence, CASA, Camp Pendleton, Children’s Hospital of Orange County, Alzheimer’s Orange County, Chapman University, United Cerebral Palsy, El Centro Cultural de Mexico, Talk about Curing Autism, and University of California, Irvine.

Welcome to Our Grand Opening

Join us for the Grand Opening of the Julianne and George Argyros Plaza and Center for Dance and Innovation on October 28, beginning at 11am and continuing until 10pm. The entire Segerstrom Center campus will be activated and ready to welcome guests with a day of family-friendly fun.

Free performances abound, including: The Patriot Brass Ensemble, TAIKOPROJECT drummers, Darden Sisters Band, Ane Thanh Lion Dance, Vybration a *cappella* sextet, Los 440’s band, Orange County’s gay men’s chorus MenAlive, Culture Shock LA, and Puppets and Players Little Theatre. Caricature artists, trick-or-treating and face painting will add to the festive mood.

Pacific Symphony, Philharmonic Society of Orange County and Pacific Chorale will join the celebration, as will South Coast Repertory and Orange County Museum of Art. For the evening, the Argyros Plaza will be transformed by its dramatic new lighting design, with guests enjoying California bands Orgōne and Monophonics. Also featured will be BANDALOO, returning to the Center with a new breathtaking, gravity-defying performance. The company will weave intricate choreography across the wall of Segerstrom Hall forty feet above the new Argyros Stage.

The Part You Can Play

Be part of the **Segerstrom Center’s Next Act Capital Campaign**. For information, contact **Nicole Balsamo**, Executive Vice President of External Affairs at 714.556.2122 ext. 4269, email: NBALSAMO@SCFTA.ORG, or visit SCFTA.ORG/NEXTACT.



Recognizing Community-Minded Businesses

MOMS Orange County (MOMS) is grateful to the corporate sector for its support of our mission to help families have healthy babies. We would like to recognize the following Orange County businesses that are among our newest friends. Each has impacted our mission in creative and meaningful ways that tangibly support new mothers, fathers and their babies in Orange County, helping them to have their best possible start as a family.

Service Champions Heating & Air Conditioning

– Brea-based Service Champions donated \$1,000 and several barrels of diapers, infant clothing and other newborn essentials. It also fulfilled the wish lists of families who participated in a Service Champions' Good Deeds for Free video to help create awareness about MOMS: <https://youtu.be/JVmPM4j6zX8>



Big Lots – When Big Lots' Store Team Leaders from the Western U.S. recently gathered in Anaheim, they spent part of their day packing 400 newborn necessities kits. Additionally, Big Lots Foundation provided \$7,000 for MOMS to purchase all the diapers, wipes, baby wash and other essentials that filled the kits.

Dimension Data – Its Irvine office selected MOMS as part of its global Heads, Hearts and Hands initiative. Employees first competed to collect the most infant care essentials at a mock "baby shower." This was followed by a morning at MOMS Orange County in which 20 Dimension Data staff packed 110 new diaper bags with the many essentials so highly appreciated by new parents.

For information on corporate service projects, please contact Amanda Warner at 714.352.3406 or awarner@momsorangecounty.org.

MOMS Orange County Congratulates
PIMCO
 as the recipient of its inaugural award of
Champion for Babies & Families
 for creating a working environment exceptionally supportive
 of employees who are new and expectant parents.

Look for the 2018 nomination application in Spring

momsorangecounty.org



Transport Your Events to Italy at Il Fornaio

When you are searching for the ultimate Italian dining experience, step inside Il Fornaio in Irvine and take a culinary journey through Italy. Early mornings bring rustic, crisp crusted bread hot from the oven accompanied by the scent of fresh-brewed espresso. During lunch and dinner hours, pastas and flavorful sauces simmer while meats and vegetables roast over hot coals. Bottles of wine from small, regional wineries are uncorked to complement the dishes, which have been crafted in the custom of Italy's chefs, bakers and homemakers. The authentic food, bread and wine will transport you to Italy and the beautiful private dining room space will create the ultimate event experience for you and your guests. Ask to speak with the on-site event coordinator when planning your next business meeting, family gathering, rehearsal dinner or wedding.



Il Fornaio aspires to bring its guests closer to Italy with each visit to the restaurant.

Enjoy happy hour Monday to Friday with \$6 specialty cocktails, draft beer, select wines by the glass, full-size appetizers and authentic Italian pizza, or hold a bocce ball tournament.

Festa Regionale Celebrates Regional Selections

Il Fornaio aspires to bring its guests closer to Italy with each visit to the restaurant. In addition to the core menu, Il Fornaio features a different region of Italy each month as part of its *Festa Regionale* celebration. Dine from this regional menu and receive a monthly stamp on the Passaporto and a special gift. At the end of six consecutive stamped months, Passaporto holders can enter for a chance to win the ultimate Italian experience: a trip for two to Italy.

Il Fornaio is located at 18051 Von Karman Avenue in Irvine. For reservations, please call 949.261.1444 or learn more about Il Fornaio at www.ilfornaio.com.



Experience Authentic Italian Dining

Open for Lunch Monday thru Saturday & Dinner Every Day

18051 Von Karman Ave. • Irvine

949.261.1444

