Disney's Paradise Pier Hotel, Anaheim
Thursday – Friday, February 4-5, 2016

Hosted by:
Orange County Funders Roundtable
Local Funders, Regional Impact.
DAY ONE
Feb 4th, 7:30 AM - 6:30 PM

7:30 AM  Networking Breakfast
8:30 AM  Welcome and Opening Plenary with Dr. James Doti
9:45 AM  Yes, and….
10:15 AM  Break
10:30 AM  Group Discussion: Leadership and Transformation
11:15 AM  Break
11:30 AM  Lunchtime Plenary with Trista Harris
1:00 PM  Workshop: How to Become a Change Agent
2:30 PM  Break
3:00 PM  Interactive Sessions: Strategies for Growth and Sustainability
  Leadership: Surviving and Thriving
    A. Nurturing Oneself for the Journey
    B. Cultivating Talent in your Organizational Pipeline
  Development: Debunking the Myth(s) of Development
    A. What Big Bets Can Teach Us
    B. Honest Conversations at the Heart of Development
  Connecting Evaluation, Strategy, and Learning: Threading It Together
  Collective Impact: From Feasibility to Sustainability
5:15 PM  Break
5:30 PM  Networking Wine Reception

DAY TWO
Feb 5th, 7:30 AM - 12:00 PM

7:30 AM  Networking Breakfast
8:30 AM  Welcome
8:40 AM  Real Costs. Real Outcomes with David Greco
10:15 AM  Break
10:30 AM  Funder Panel Q&A
11:15 AM  Celebration with Jack Toan
11:50 AM  Closing
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Event planning services provided by [Eventive Group](#)
On behalf of the Planning Committee, welcome to the 5th Summit of the Orange County Funders Roundtable! We are excited to again bring together the leaders of the nonprofit sector as we work to advance positive change in our region. The Summit theme, Coming Together, is a reflection of our industry’s evolving understanding of the need for real collaboration, lasting impact, and partnerships that build on our individual efforts as organizations. We believe that collaboration is critical not just between nonprofit organizations, but also between nonprofit organizations and funders. We hope that the content of this conference inspires conversations and relationships toward that end.

You will see that our agenda is an ambitious and interactive one – our speakers will inspire us to think about ways that we can foster change – in ourselves and in the organizations we serve. Our moderators will help us focus on strategies that support both growth and sustainability, such as leadership, development, evaluation and collective impact. And our facilitators will foster dialogue about what is working (or not!) as we work toward our missions. From a focus on real costs, to real discussions about philanthropy and investment, this conference is all about honest conversation and how we can work better together.

Special thanks must go to our Planning Committee for their contribution of time and talent to the development of this content, and to our Executive Administrator Ruchi Warrier who guided the process.

We look forward to your feedback and participation in this great event.

Ed Kacic and Lisa Fujimoto
Co-Chairs, 2016 Summit Planning Committee

This year represents our 10th year as an association of grantmakers specifically dedicated to strengthening the Orange County nonprofit sector, and providing support and resources for funders who are investing in the region. What started as a loose affiliation of grantmakers grappling informally with the state of philanthropy in Orange County and the capacity needs of its nonprofits has become a formal membership organization that is 45-members strong, and growing! Over the years we have worked on issues related to homelessness, workforce development, capacity building, regional indicators and more. We have brought in resources to help educate our members on trending issues, and fostered dynamic discussion on strategies to address our region’s most pressing challenges. Across these diverse issues, we are working to build local solutions through local collaboratives informed by national and state best practices and emerging successful strategies.

Our most visible effort and best example of this work is The Summit. In 2010, the first conference was a one day event that included 75 executive directors and funders, and was a spontaneous response by the OCFR to the impact of the decline in revenue and increase in need brought on by the recession. Since then, the conference has grown to include more than 250 participants across 2 days of sessions and presentations, all designed to foster relevant dialogue and collaboration between providers, partners, board members and investors in the region. Our 2016 Summit looks to be our best yet as you will see from our ambitious agenda. We hope to facilitate discussions within the sector to respond the challenges of leadership, sustainability, and community impact.

Christina Altmayer
Chair, OC Funders Roundtable
Conference Materials and Name Tags – If you are attending both days of the Summit, please remember to bring your name tag and Summit materials on Day 2. There is a limited supply of materials, and we are trying to be eco-friendly. After the Summit, all available materials and PowerPoint presentations will be posted online at www.ocfunders.org.

Meals – Continental breakfast and a plated lunch will be served on Day 1 (2/4) and continental breakfast will be served on Day 2 (2/5). If you have requested a special meal for lunch on Day 1, please be sure to let your server know when you sit down at your table.

10th Anniversary Reception – Please join us at the end of Day 1 (2/4) to relax and enjoy complimentary appetizers and beverages at the Poolside Pavilion. The OC Funders Roundtable will celebrate its 10th Anniversary.
Special thanks to the Summit Planning Committee for shaping the focus and content of The 2016 Summit

Christina Altmayer  
Executive Director  
Children and Families Commission of Orange County

Sharon Battle  
Senior VP, Orange County Market Manager  
Bank of America

Ria Berger  
Chief Executive Officer  
Healthy Smiles for Kids of Orange County

Sandy Chiang  
Program Manager  
The California Endowment

Heather Cova  
Leadership Network Manager  
Fieldstone Foundation

Terrie Doizaki  
Program Officer  
Weingart Foundation

Lisa Fujimoto  
Executive Director  
Change a Life Foundation

Rossina Gallegos  
Vice President, Community Development Officer  
Union Bank of California

Miguel Hernandez  
Executive Director  
Orange County Congregation Community Organization

Shelley Hoss  
President  
Orange County Community Foundation

Ed Kacic  
Irvine Health Foundation  
Irvine Health Foundation

Jason Lacsamana  
Project Manager  
St. Joseph Health Community Partnership Fund

Kevin O’Grady  
Co-Founder and CEO  
O’Grady School Solutions

Anne Olin  
President & Chief Executive Officer  
The Olin Group

Pam Pimental  
Chief Executive Officer  
MOMS Orange County

Shawna Smith  
Executive Director and Chief Executive Officer  
Taller San Jose

Carla Vargas  
Vice President, Investor Relations – Major Investors  
Orange County United Way

Mary Vu  
Director and Co-Founder  
Project Kinship

Ruchi Warrier  
Executive Administrator  
Orange County Funders Roundtable

Zoot Velasco  
Executive Director  
Muckenthaler Cultural Center
With gratitude and appreciation for the generous support of our community

To all of you …

…for your generous support to our community partners who serve the homeless. Your gifts of AA and AAA Batteries, rain ponchos, beanie hats, hand warmers, warm socks (men’s and women’s) will be passed out by 2-1-1 Orange County to homeless sleeping unsheltered or who are in the Armories during the Winter.

…for sharing your stories of leadership, transformation, and impact in the Orange County community and beyond. The slide show presented in the break room will be available after The Summit at www.ocfunders.org.

…for taking a risk and exploring with us during the sessions, and expressing your hopes and dreams on the community graffiti wall in the break room.

…for encouraging learning, networking, and sharing amongst participants with a donation of your organizational and community resource materials.

For Participant Gifts

To teens at Muckenthaler’s Teen Arts Center in Placentia (funded in part by Orange County Community Foundation) for handmade bookmarks commemorating The 2016 Summit

To Disney for giftbags and magical 60th Diamond Celebration castle globes

To Change a Life Foundation for the generous donation of timepieces in honor of this year’s Sister Regina Fox Quiet Achiever Award and more!
What is the Orange County Funders Roundtable?

The Orange County Funders Roundtable (OCFR) is a funder collaborative committed to promoting effective philanthropy and strengthening the nonprofit sector in Orange County.

Since 2006, the OCFR has promoted information sharing and collaborative funding projects among regional funders and sponsored community needs assessments to better gauge the issues facing local nonprofits. Through discussion and debate, OCFR members identify current issues facing the community and challenges facing the nonprofit sector. Past areas of focus have included technical assistance, capacity building, homelessness, job development, census, loan funds, and financial resources.

The OCFR is not itself a grant-making organization and does not have a grant application or funding cycle. However, OCFR members occasionally pool their funds to build nonprofit capacity or to support regional initiatives, such as its Summit for Nonprofit Leaders.

The OCFR welcomes a wide variety of institutional philanthropists dedicated to supporting Orange County’s community needs. Members benefit from peer education and networking, as well as opportunities to engage in collaborative projects and funder-nonprofit dialogue.

For more information on the OCFR, visit our website at www.ocfunders.org.

2016 OCFR MEMBERS

- Allergan Foundation
- Bank of America
- Change a Life Foundation
- Children and Families Commission of Orange County
- Cox Communication
- Disneyland Resort
- Edwards Lifesciences Fund
- Fieldstone Foundation
- Fluor Foundation
- Irvine Health Foundation
- JPMorgan Chase Foundation
- Kay Family Foundation
- Marisla Foundation
- Opus Community Foundation
- Orange County Community Foundation
- Orange County United Way
- Pacific Life Foundation
- PIMCO Foundation
- Samueli Foundation
- Sisters of St. Joseph Healthcare Foundation
- St. Joseph Health Systems Foundation
- Tarsadia Foundation
- The Boeing Company
- The California Endowment
- The Keith and Judy Swayne Family Foundation
- The Nicholas Endowment
- Thompson Family Foundation
- Ueberroth Family Foundation
- Union Bank Foundation
- Western Digital Foundation
- Weingart Foundation
- Wells Fargo
7:30 AM  **Networking Breakfast**

Enjoy a casual buffet-style breakfast with your colleagues and local funders.

8:30 AM  **Summit Welcome and Overview**
Christina Altmayer

**Opening Plenary with Dr. James Doti**

Designed to inspire our philanthropic community of leaders, join us on this journey as we bring together a community of passionate, committed professionals to co-create a shared vision for Orange County. Dr. James Doti will share a retrospective of his own journey as a catalyst for transformative change.

9:45 AM  **Yes, and…**
Rich Baker and Dan Oster

When is the last time you let down your guard and fully embraced all that was happening around you? Join Improv artists Rich Baker and Dan Oster as they introduce an approach that asks you to give up control and be completely present as you “say yes” to immersing yourself in a discussion, scene, or life as it comes… whether or not things are going according to plan!

10:15 AM  Break

10:30 AM  **Group Discussion: Leadership and Transformation**
Ria Berger, Amanda Fowler, Jennifer Friend, Rossina Gallegos, Gene Howard, Sarah Middleton, Margie Wakeham

Join a discussion with your peers as we 1) explore the role of leadership in creating and sustaining transformation, 2) share experiences and ideas that translate ideas to practice and 3) create space to reflect on our own leadership practice.

11:15 AM  Break

11:30 AM  **Luncheon Plenary with Trista Harris**

The reason most change efforts fail is because they fail to address systems as a whole. In this workshop, you will hear the stories of Change Agents within our community and will have an opportunity to reflect on your own story as we explore how each of us can act within a complex environment to create and sustain positive change.

1:00 PM  **Workshop: How to Become a Change Agent**
- Shelley Hoss, Robert Santana, Keith Swayne
- Steve Kim, Jason Lacsamana, Anne Olin, Mary Vu
- Eric Altman, Miguel Hernandez, Kevin O’Grady
- Christina Altmayer, Sandy Chiang, Melody Gonzalez, Ana Urzua

The reason most change efforts fail is because they fail to address systems as a whole. In this workshop, you will hear the stories of Change Agents within our community and will have an opportunity to reflect on your own story as we explore how each of us can act within a complex environment to create and sustain positive change.

2:30 PM  Break
As leaders, we are so often focused on perfecting the delivery of our mission that we often forget to pause and reflect on what brought us or our colleagues to the table in the first place. Fred Ali, along with local leaders, will lead us through an exploration of leadership: how we can both nurture ourselves for the journey, as well as cultivate talent in our organizational pipelines.

Ready to think big? Join Jack Toan in this interactive session which will challenge traditional paradigms of nonprofit development and ask you to risk it all on a Big Bet for social change. You’ll then join an intimate and honest conversation with The Illumination Foundation as they consider what truly lies at the heart of development.

Many of us will admit to having wondered, “Beyond reporting, how can evaluation really help me?” Kim Goll, along with Blue Garnet, FSG, and Harder + Company, will talk through real-world examples and stories that will highlight the connection between mission, evaluation, strategy, and learning.

We’ve all heard the buzz around Collective Impact, but it isn’t for the faint of heart. It’s also not the right solution for every problem. Find out what it takes to sustain this long-term approach to systemic change in discussion with Admas Kanyagia and Valerie Jacobs Hapke, who will walk you through an exploration of the Jacobs Center for Neighborhood Innovation’s approach to lasting change. Their presentation will be followed by facilitated table discussions with expert CI practitioners in Orange County that will help you identify the key principles that lead to sustainable and long-term change with collective impact.

Raise a glass to celebrate OCFR’s 10th anniversary and take a moment to catch up with friends and colleagues.
7:30 AM  Networking Breakfast
Enjoy a casual buffet-style breakfast with your colleagues and local funders.

8:30 AM  Welcome
Christina Altmayer

8:40 AM  Real Costs. Real Outcomes with David Greco
Introduction by Max Gardner
You don’t use the same phone you did in 2005, so why are we using the same approach to grantmaking? Max Gardner shares his perspective on why now is the time to change our approach – both as funders and nonprofits. David Greco will then guide us through a series of paradigm-shifting activities that highlight a new approach to considering the real costs of achieving real outcomes.

10:15 AM  Break

10:30 AM  Funder Panel Q&A with Shelley Hoss
Vicki Booth, Terrie Doizaki, Katie Ellis, Ed Kacic, Jason Lacsamana
You asked for it, and we’ve delivered. Shelley Hoss will host a diverse panel of local funders in a candid discussion of questions you raised on topics ranging from relationship-building to collaboration to achieving meaningful and lasting social change.

11:15 AM  Celebration with Jack Toan
Improv with Rich Baker, Dan Oster
Quiet Achiever Award with Sister Regina Fox
Performance by Zoot Velasco
As the conference winds down, we will honor the recipient of The Sister Regina Fox Quiet Achiever Award. We’ll also take a moment to celebrate with improv, the ultimate form of co-creation, and enjoy a special performance piece by our very own Zoot Velasco.

11:50 AM  Closing
Christina Altmayer
Christina Altmayer serves as guide in a moment for pause and reflection as we ready ourselves for the journey ahead – together, as a community of philanthropic leaders. Until next time....

Sister Regina Fox Quiet Achiever Award

In April 2013, the Orange County Funders Roundtable saluted founding member Sister Regina Fox for her quiet acts of kindness, advocacy and generosity, and her tireless efforts to serve the needs of those at risk in Orange County. Her giving spirit and more than 20 years of professional and personal service in the areas of mental health, health services, homeless services, and violence prevention for underserved Orange County residents is greatly appreciated and has not gone unnoticed.

To show our appreciation for her work, and to encourage the spirit of service she has demonstrated throughout her career, OCFR established the Sister Regina Fox "Quiet Achiever Award." This award will be presented to a nonprofit professional or volunteer that embodies the Quiet Achiever spirit at each Summit for Nonprofit Leaders.

All nominees exemplify the following characteristics:

1. Long-term commitment to one or more critical institutions in the OC nonprofit landscape
2. Advocacy of solutions to difficult community challenges
3. Ability to bring diverse stakeholders together in common cause
4. Demonstrated tireless effort and even enthusiasm where others fear to tread
5. Known generosity of spirit
James L. Doti, PhD  
*President, Chapman University*

Dr. Doti is the 12th President of Chapman University having served since June, 1991. He has held the University’s Donald Bren Distinguished Chair in Business and Economics since 1999. In 1978, he founded the Center of Economic Research and with his students developed the Chapman Econometric Model, the first quarterly economic model for a metropolitan area. The model continues to be used as a teaching tool at the University and today is the longest running forecast in the nation.

David Greco  
*Managing Partner, Social Sector Partners*

David brings more than 25 years of experience working in the social sector. From scaling programs to developing new products and services to launching earned income ventures, David has specialized in strategic repositioning and business model adaptation. David is currently serving as Project Director for the Real Cost Project a statewide initiative that aims to increase the number of funders providing real cost funding. Previously, David served as Interim President and CEO for Northern California Grantmakers and as Vice President of the Nonprofit Finance Fund (NFF) for more than 5 years. He is the author of “Nonprofit Financial Management” featured in “Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals”.

Trista Harris  
*Philanthropic Futurist, Author and President, Minnesota County on Foundations*

Trista Harris is a philanthropic futurist and nationally known as a passionate advocate for new leaders in the philanthropic and nonprofit sectors. Trista’s work has been covered by the Chronicle of Philanthropy, CNN, the New York Times, and numerous social sector blogs. She is also the co-author of the book “How to Become a Nonprofit Rockstar” and speaks internationally about using the tools of futurism in the social sector. In her professional life, Trista is president of the Minnesota Council on Foundations, a vibrant community of grantmakers who award almost $1 billion annually.
Fred Ali
President and Chief Executive Officer, Weingart Foundation

Fred Ali is the President and Chief Executive Officer of the Weingart Foundation, a private foundation that supports nonprofit organizations in more effectively addressing the needs of low-income and underserved individuals and communities in Southern California. Prior to his appointment to the Foundation in 1999, Fred held senior leadership positions with non-profit organizations, educational institutions, and government agencies. Fred serves on the Board of Grantmakers for Effective Organizations, and the Board of the Los Angeles Mayor’s Fund. He also chairs the Board of the Center on Philanthropy and Public Policy, University of Southern California. He is a senior Fellow at the UCLA Luskin School of Public Affairs.

Iosefa Alofaituli
Regional Director, Opportunity Fund

In December 2015, Iosefa Alofaituli joined Opportunity Fund to lead the organization’s development and brand awareness efforts in Southern California as the Regional Director. Prior to Opportunity Fund, Iosefa helped launch an innovative place-based nonprofit organization focused on a low-income Latino community in Huntington Beach, CA, named Oak View Renewal Partnership (OVRP). As Executive Director/CEO, he lead strategic planning, operations and fund development. Prior to OVRP, Iosefa was a Peace Corps volunteer for over two years in the Dominican Republic. Serving as an Economic Development Advisor to a fishing village, he led the creation of an artisan school, micro-enterprises, business development course, travel clinic, and health workshops. Through this experience, Iosefa gained Spanish fluency. Preceding his community development work, Iosefa spent five years in the healthcare industry in sales and accounts management roles. He grew up in Southern California before graduating from the University of Pennsylvania.

Eric Altman
Independent Consultant

Eric Altman is an independent consultant working with nonprofit organizations and civic groups on community engagement, strategic planning, and organizational development. Prior to his consulting work, Eric served for 9 years as the founding Executive Director of Orange County Communities Organized for Responsible Development (OCCORD), where he developed the organization’s unique combination of community organizing, civic participation, policy research, and advocacy work. From 1989 to 2004, Eric worked for UNITE HERE, the national union of hospitality workers, where he helped to build one of the labor movement’s most respected strategic research operations. He holds a BA in Political Science from Yale University.
Christina Altmayer
*Executive Director, Children and Families Commission of Orange County*

Christina Altmayer has served as the Executive Director of the Children and Families Commission since March 2013. Her leadership has focused on developing diversified funding to sustain the Commission’s impact on early childhood health and school, including exploring the feasibility of Pay for Success contracts through philanthropic and federal grants. Christina had previously served as a consultant to the Commission since its inception in 1999 and served as the program director for its pediatric health investments. Prior to her current position, Christina was the President of Altmayer Consulting, Inc. and specialized in management consulting to public and nonprofit agencies. She has worked extensively with government agencies at the state, county, and community level on strategic planning, performance management, evaluation, and innovative program design. Christina is the author of several publications on performance management and a frequent speaker on the topic. She has a BA and MA in Public Administration from St. John’s University, New York.

Rich Baker
*Performer and Improv Teacher*

A performer and Improv teacher with The Second City, Rich Baker has been studying and performing improvisation for over sixteen years. He’s traveled both the country and the world performing and teaching. In addition, Rich has lead trainings with many different businesses and organizations teaching the valuable skills that Improv has to offer in the non-performing world.

Shari Battle
*Corporate Social Responsibility Market Manager, Bank of America*

Shari Battle is the Corporate Social Responsibility Market Manager for Bank of America in Orange County. As Market Manager she is responsible for championing the company’s corporate social responsibility, driving brand favorability and organic revenue growth in Orange County. In a career with Bank of America that spans 25 years, Shari has held leadership roles in a number of businesses; retail banking, leadership development, marketing and corporate social responsibility. In her current capacity, Shari works with local executives to deliver the bank’s brand across Orange County. She is responsible for strategic local delivery of the bank’s corporate social responsibility commitment, charitable giving, sponsorship activities, media relations, government relations and associate engagement. Shari is active in the community where she serves on the Orange County Business Council board of directors where she chairs the workforce housing committee. She is on the United Way’s Financial Stability Impact Council, the Orange County Funder’s Roundtable, is a board member of the Aliso Viejo Middle School PTSA and a committee member of the Aliso Niguel High School PTSA. Shari graduated from the University of California, Los Angeles where she majored in economics. As an Orange County native, Shari and her husband, Lawrence, reside in Laguna Niguel with their two daughters.
Melissa Beck  
*Chief Executive Officer, Big Brothers Big Sisters*

Melissa is currently a Chief Executive Officer with Big Brothers Big Sisters overseeing Orange County and the Inland Empire. As CEO of the largest agency in California and the 5th largest agency in the U.S. (out of 340), Melissa is responsible for the general operations and oversight of 50 staff members and all programming for the nearly 3,000 children the agency serves through 200,000 volunteer hours per year. Melissa is also the Chair of the California State Association for Big Brothers Big Sisters. During her time with Big Brothers Big Sisters, Melissa has grown children served by over 40%, launched a workplace-mentoring program that has partnered the agency with some of the most premier corporations in the country, lead their expansion into San Bernardino and Riverside counties, grew revenue by over 80%. Every year since taking her role in the agency, Melissa has received nominations for both the top agency and boards of directors of the year. Melissa is a tireless advocate for children facing adversity, believing that all children should have the opportunity to succeed in life and reach their full potential. She is a sought after speaker both on the plight of at-risk youth as well as women/mothers in leadership roles. Melissa received her Bachelors of Science in Accounting with a minor in Economics from Northern Arizona University and an MBA (magna cum laude) from the UIC Irvine, Paul Merage School of Business. Melissa and her husband live in Laguna Niguel with their three sons.

Ria Berger  
*CEO, Healthy Smiles for Kids of Orange County*

Ria Berger is the CEO of one of the largest nonprofit oral health providers for children. Berger holds more than 25 years of operations, human resources and business development experience in multi-cultural, multi-site locations, in the United States, Europe, Asia and the Middle East. Ria Berger has a Masters Degree in Public Administration, and has taught various HR and business courses at UCI and USC. Her greatest strengths are in strategically planning, and clearly focusing on the successful execution of world class organizational, leadership and people development programs. Her specialties include extensive, and current experience in strategy, operations, fund development, Board recruitment and development, talent acquisition and management, leadership development, change management, culture transformation, mergers and acquisitions; and building effective systems integration and analytics within the healthcare, financial, retail, and service industries. She is strategic as well as tactical, in all facets of leading Fortune 500, private corporations and nonprofit organizations.

Sandra Bolton  
*Executive Director, Pretend City Children’s Museum*

Sandra Bolton has served the last four years as the Executive Director of Pretend City Children’s Museum having been recruited by the Board of Directors for her more than thirty years serving and advocating on behalf of children. Sandra started her career as a Registered Nurse and has practiced medical malpractice defense law. She has served as the Director of Nurses for pediatric units in acute care hospitals and recently served as Vice President of Professional Services at City of Hope. In that position she worked with the Chief Medical Officer to facilitate and develop clinical care and medical center programs. Prior to City of Hope, Sandra served as the founding Executive Director of Healthy Smiles for Kids of Orange County. Under her leadership, the organization raised more than $7.5 million in its first four years, and with the help of the Children & Families Commission of Orange County constructed a 7,000-square-foot dental facility. She collaborated with the Commission and USC School of Dentistry and Children’s Hospital of Orange County to establish the first dental residency program in Orange County. Sandra completed a fellowship in the Executive Program for Nonprofit Leaders at Stanford University Graduate School of Business.
Vicki Booth  
*President, Ueberroth Family Foundation*

Vicki U. Booth is the President of the Ueberroth Family Foundation. In this capacity she works with dozens of non-profit organizations county wide. Vicki is the past Chair of the board of Governors of the Orange County Community Foundation where she also chairs the Fund Distribution Committee. She is a Founding Trustee of Sage Hill School, an independent, non-denominational High School and is a former Chair of the Board of Trustees. Vicki has served on the steering committee of the Family Foundation Alliance since its inception and is a member of the Orange County funder’s roundtable. Booth is a member of Circle 1000, a fundraising group for Hoag Hospital’s Cancer Center, and served as Chairman for 4 years. She has served as a volunteer for many years at both Sage Hill School, and Harbor Day School, where she was Parent Council President. Vicki received her Bachelor’s degree from the University of Colorado. She and her husband Bill have three children.

Ron Brown  
*Chief Program Officer, Children’s Bureau*

Mr. Brown has managed the operations of Children’s Bureau’s foster care, adoption, mental health and child abuse prevention programs for over fifteen years and has grown each program by acquiring larger contracts and implementing new services. He is also responsible for the agency’s accreditation from the Council on Accreditation. Mr. Brown was an active participant in the development of the Magnolia Community Initiative (MCI) and has provided direct oversight since its inception. He plays a key part in Network Anaheim by providing MCI experiential insights and guidance to its growth. Mr. Brown’s background is in health care where prior to joining Children’s Bureau, he worked for many years at Citrus Valley Hospice and Home Health, Inc. He holds a B.A. from the University of California, Santa Barbara and an M.B.A. from California State University, Long Beach.

Dana Butler-Moburg  
*Executive Director, J.F. Shea Therapeutic Riding Center*

Dana Butler-Moburg has her dream job. As an accomplished equestrian and passionate nonprofit professional, being the executive director of The J. F. Shea Therapeutic Riding Center the past 18 years has been both a labor of love and a calling to serve people with disabilities. With more than 30 years in the nonprofit health and arts worlds, she brings solid business management, board, organizational and fund development to her professional and volunteer lives.

Sandy Chiang  
*Program Manager, The California Endowment*

Sandy Chiang was appointed as the Central Santa Ana Program Manager for the Building Healthy Communities initiative in August 2015. Prior to this position, she was the Program Manager for the Central Long Beach. Prior to her appointment as program manager, Chiang served for two years as a program associate at The Endowment during which she provided analysis of grant proposals, served on the monthly peer review committee for funding recommendations and provided technical assistance to organizations across the state seeking grant funding. A resident of Los Angeles, Chiang earned her bachelor’s degree in Science: Microbiology and Molecular Genetics from UCLA and her master’s degree in Public Health: Health Promotion and Education from Loma Linda University’s School of Public Health.
Vivian Clecak
*Leadership Coach and Consultant*

Vivian Clecak is a leadership coach and consultant on organizational change. She retired recently (January 31, 2016) after 34 and a half years as the founding CEO of Human Options: Alternatives for Abused Women and their Families. Needless to say, she had not only consulted on organizational change but has led and experienced multiple forms of change in 34 years.

Joelle Cook
*Associate Director, FSG*

Joelle has a decade of experience in evaluation and research with a particular focus on evaluating complex advocacy and systems change efforts at the local, state, and national level. Joelle is currently an Associate Director with FSG, a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Prior to joining FSG, Joelle was a consultant with ORS Impact, a Peace Corps volunteer in Togo, and a research assistant with the University of Washington. A member of the American Evaluation Association since 2009, Joelle has presented a number of sessions at its annual conference. Joelle holds a Master of Public Administration (MPA) from the University of Washington’s Evans School of Public Affairs and a Bachelor of Science (BS) in Political Science with a minor in Statistics from the University of Iowa.

Angel Roberson Daniels
*Vice President of Grants, The Angell Foundation*

Throughout her career, she has worked with foundations and community-based organizations to design and evaluate programs and interventions that effectively produce positive outcomes for vulnerable communities. She joined The Angell Foundation in 2005 as Senior Program Officer and was named Vice President in 2013. In her current role, she works closely with the President to set the Foundation’s strategic direction and manages the daily philanthropic and administrative operations. Before joining The Angell Foundation, Angel was a Program Officer at First 5 LA where she was instrumental in the development of large-scale community and systemic initiatives and the allocation of over $800 million in investments designed to benefit young children and their families throughout Los Angeles County. She facilitated and led planning and assessment efforts for local nonprofit and public health organizations as a Research Analyst for the UCLA Technical Assistance Group and has served in various capacities working with and on behalf of organizations that provide care and support to foster youth in South Los Angeles. She serves in a leadership capacity on several philanthropic committees including the Los Angeles Partnership for Early Childhood Investment and the Los Angeles County Arts for All Pooled Fund and is a member and Leadership Fellow of the Association of Black Foundation Executives.

Terrie Doizaki
*Program Officer, Weingart Foundation*

Terrie Doizaki joined the Weingart Foundation in 2006 as a Program Associate and was promoted in 2007 to Program Officer, responsible for reviewing Regular Grant Program requests from Orange County. Prior to joining the Foundation, she served as Development Manager for the Pasadena Mental Health Association. Terrie holds a master’s degree in public policy from Claremont Graduate University and a bachelor’s degree in government from Claremont McKenna College.
Katie Ellis  
*Executive Director, Opus Community Foundation*

Katie S. Ellis is the Executive Director of Opus Community Foundation, established by Opus Bank in 2010. Katie was appointed to the role at the organization’s inception. Through her leadership, Katie has cultivated a spirit of philanthropy and social responsibility as an integral aspect of Opus Bank’s corporate culture and maintains overall responsibility of the company’s philanthropic efforts, including charitable contributions and employee volunteerism. Prior to this role, Katie was a Manager of Major Gifts at Hoag Hospital Foundation. Katie holds a master’s degree in business administration from University of California, Irvine and graduated with Magna Cum Laude and Phi Beta Kappa honors from University of California, Los Angeles. She and her family live in Newport Beach.

Mary Anne Foo  
*Executive Director, Orange County Asian and Pacific Islander Community Alliance, Inc. (OCAPICA)*

Mary Anne is the executive director and founder of the Orange County Asian and Pacific Islander Community Alliance, Inc. (OCAPICA) a non-profit community based organization serving the diverse and underserved communities in Southern California regarding health, mental health, policy and civic engagement, youth leadership and education, and workforce development. OCAPICA has nearly 80 staff who speak 17 languages and serve more than 40,000 community members a year. Mary Anne has been working for almost 30 years on issues affecting diverse populations on national, state and local level at several community and county wide organizations. She received her Bachelor of Science from UC Davis and her Master in Public Health from the UCLA.

Amanda Fowler  
*Executive Director, Global Corporate Giving, Edwards Lifesciences*

Amanda C. Fowler is executive director, global corporate giving of Edwards Lifesciences Corporation. Amanda was appointed to the new role of executive director in 2011 and has overall responsibility for the company’s philanthropic efforts including The Edwards Lifesciences Fund and the Strengthen Our Community employee volunteer program. Prior to this role, Amanda served the company in global communications focusing on external corporate and executive communications, the critical care business unit, and The Edwards Lifesciences Fund. Amanda was the planning chair of the American Heart Association’s 30th Annual Heart Ball, which raised more than $750,000 for heart disease research and programs. She is also a past president of the Orange County chapter of the National Investor Relations Institute and has been the financial advisor for the Delta Gamma sorority at the University of California, Irvine. She received a bachelor’s degree in social science with an emphasis in economics from the University of California, Irvine.
Sister Regina Fox
Program Director, Sisters of St. Joseph of Orange

Sister Regina Fox, SSND, a School Sister of Notre Dame, is the Program Director for the Sisters of St. Joseph of Orange’s grant programs, focusing on access to health services, dealing with mental health issues, violence prevention and homelessness. In this role she participates as a member of the Health Funders Partnership of Orange County where she is currently the chair, the Orange County Funders Roundtable and the county’s Commission to End Homelessness. Regina has served in the nonprofit sector since 1983 in a variety of roles, beginning nonprofits, serving as a nonprofit consultant with experience facilitating diverse groups including mature and startup agencies. Prior to ministry as a consultant and program director, she was involved in secondary education and administration for 23 years.

Jennifer Friend
Chief Executive Officer, Project Hope Alliance

In 2013, Jennifer resigned her law firm partnership to accept the invitation to serve as Project Hope Alliance’s CEO. Under her leadership the organization has grown from serving 1 school with less than 65 children to serving 300+ homeless children attending approximately 120 schools throughout Orange County, while also ending homelessness for over 600 children and their parents since 2012 with 87% of the families becoming financially independent within one year at an average housing cost of less than $1,500 per child. Project Hope Alliance is a Clinton Global Initiative partner and is piloting some of the most innovative programs addressing homelessness and the educational advancement of homeless children, in the nation. A graduate of UC Irvine and Whittier Law School, and active in several other community organizations, Jennifer lives in Newport Beach with her husband Rob Smith, daughter Parker, and son Beck.

Lisa Fujimoto
Executive Vice President, Change a Life Foundation

Lisa Fujimoto has been a recognized Foundation Executive Director in the philanthropic sector for 14 years with unwavering integrity, with a proven track record in the corporate affairs, community relations, private foundations, nonprofit fundraising experience, in local, national, and international corporations and agencies. She is an accomplished leader (29 years in the nonprofit, foundation and corporate sector) and an experienced manager able to influence key stakeholders in achieving objectives and building teams in the accomplishment of the organization’s goals and objectives.
Rossina Gallegos

*Director and Foundation and Community Outreach Officer*

Rossina Gallegos facilitates and manages the charitable contribution and the Foundation requests for Orange County, San Diego, and the Inland Empire. She also implements strategies, tactics and programs to maximize the talent and availability of Union Bank employees with the needs of low-and moderate-income communities. Rossina’s community outreach efforts heightens Bank presence to address the Bank’s Community Reinvestment Act commitment, public image opportunities, and employees’ desire for engagement. Rossina is active with numerous civic and community organizations. She serves on the Board of artworxLA, the Board of Trustees of St. Anne’s, and the Board of Trustees of AYE (Archdiocesan Youth Employment Services). She is also on the Advisory Board of the National Hispanic Business Women Association (NHBW), the Rancho Santiago Small Business Development Center, the Weingart East Los Angeles YMCA, and the Bilingual Foundation of the Arts. Rossina holds a B.A. from Colegio Europeo from Guatemala City, and an A.A. with emphasis in Accounting from Los Angeles City College. She has also received formal training in Banking through the American Bankers Association and other reputable institutions.

Max L. Gardner

*President and CEO, Orange County United Way*

Max Gardner is the President and CEO of Orange County United Way. In this position, Mr. Gardner leads the 91-year-old health and human services organization toward improving lives and strengthening Orange County by ensuring that local children and families have quality education, sustainable income, good health and stable housing – the cornerstones for individual success and community prosperity. A former Orange County United Way Board member and Co-Chair of the Tocqueville Society, Mr. Gardner was appointed President and CEO in July 2011. Under Mr. Gardner’s direction, United Way launched FACE 2024, a collaborative approach advancing the common good by Funding innovative programs, Advocating for the voiceless, Collaborating with those who have the passion and expertise to get things done and Educating community leaders about critical issues facing Orange County. Mr. Gardner serves on a number of boards and committees including: the Orange County Funders Roundtable (immediate Past Chair), the OC Forum and United Ways of California. In addition, he is a member of the Orange County Business Council and the UCI Chief Executive Roundtable and formerly served on the Orange County Commission to End Homelessness. Mr. Gardner holds a Bachelor of Arts degree from Duke University and a master’s degree from the Business School at Georgia State University. He and his wife reside in Newport Beach, California and have four grown children.

Kim Goll

*Strategy and Operations Director, Children and Families Commission of Orange County*

Kim Goll joined the Children and Families Commission of Orange County 2002 and is responsible for managing all contract development, execution, and compliance for the commission. Kim has led the development of the Commission’s catalytic investments strategy, which leverages a onetime funding allocation by the Commission into a multi-year services agreement allowing the Commission to reduce or eliminate ongoing funding. Additionally, she has lead responsibility for program implementation for Strong Families and Capacity Building program areas and provides key support in cultivating relationships with other local and regional funders. Kim received Bachelor of Arts degrees in Psychology and Sociology from the University of California, Davis and her Master’s in Urban and Regional Planning from University California, Irvine.
Melody Gonzalez

Campaign Coordinator, Santa Ana Building Healthy Communities

Melody Gonzalez was born and raised in Santa Ana. She has been actively involved in her community from a very young age. She received a B.A. in Political Science from the University of Notre Dame. After graduating, she moved to Immokalee, Florida, to work alongside the Coalition of Immokalee Workers. For 4 years, she served as a bridge between farmworkers and allies across the country and with company executives to reach groundbreaking agreements with multibillion corporations, such as McDonald’s, that have transformed the Florida tomato industry, ensuring dignity, right and respect for farmworkers. In 2009 she returned and began working as a Community Outreach Coordinator in Santa Ana schools. Melody used Zumba and healing circles as a way to engage parents. A few years later she was recruited to be the Director of Family Engagement at KidWorks and one year later became the Campaign Coordinator for Santa Ana Building Healthy Communities, where she helps to coordinate the Restorative Justice Coalition.

Rich Good

President and CEO of Anaheim Family YMCA

Before his 2015 arrival to Anaheim, Good served as Executive Director and CEO at the YMCA of San Joaquin County in Stockton, California. Good increased community impact resulting in 45 new programs and 18,000 participants. He expanded the after school program from eight to 24 sites, a $1.6M initiative; reflecting a budget growth from $1.4M to $3.3M; and Y staff growth from 130 to 370. Good also increased fundraising efforts by 360%. Prior to his position at the YMCA of San Joaquin County, he had a successful 28-year career with Boy Scouts of America, holding positions as Special Projects Director (2008-2009), Executive Director (2000-2008), and Chief Development Officer (1996-2000). Good is also an avid scuba diver, snow skier, woodworker and thespian. He can often be found with his daughter eating ice cream and taking in shows in the Magic Kingdom.

Todd Hanson

Vice President of Donor & Community Engagement, Orange County Community Foundation

Todd Hanson is vice president of donor & community engagement at the Orange County Community Foundation. For more than 14 years Todd has provided support to some of Orange County’s most generous families, helping them achieve their philanthropic goals and inspiring effective and impactful giving. He works with donors to develop personalized giving plans, arrange agency site visits, organize presentations on community issues and provide research reports on nonprofits. He visits more than 100 local charities each year to stay informed on the latest programs, services and results.
Paul Harder  
*Founder and CEO, Harder+Company Community Research*

Harder+Company started in 1986 and now has offices in Los Angeles, San Francisco, San Diego and Sacramento. The company provides learning and strategy services to a wide range of clients in the philanthropy, nonprofit and public sectors. With a diverse staff of 75, Harder+Company’s work encompasses health and behavioral health, social services, education, the arts, community development and social justice. While based in California, the company works across the US to improve the effectiveness of its clients. Paul’s own work has focused on strategic learning and capacity building, with an emphasis on community participation. His Southern California clients have included the Irvine Health Foundation, the California Endowment, the Weingart Foundation, the GRAMMY Foundation and the California Wellness Foundation. Paul started his career at the Lewin Group in Washington, DC before moving to the Urban Institute. He is committed to community service, having served on the boards of the National AIDS Fund, CompassPoint and the Yolo Community Foundation. Paul has an MBA in Nonprofit Management and an MA in Social Welfare, both from the University of Chicago. He and his wife live in Los Angeles.

Miguel Hernandez  
*Executive Director, Orange County Congregation Community Organization (OCCO)*

Miguel Hernandez is the Executive Director of OCCCO, the Orange County Congregation Community Organization. As OCCCO’s director, Miguel focuses on identifying and developing resilient and committed volunteer community leaders in low-income communities who can lead and transform their neighborhoods. Miguel has led successful initiatives in community-oriented policing in Santa Ana, increasing green space in the City of Costa Mesa and Santa Ana; including the Delhi Community Center, and increasing voter participation. Miguel has taken leadership roles in innovative collaborations, including the Santa Ana Building Healthy Communities (SABHC) 10-year initiative funded by The California Endowment, the Orange County Civic Participation collaborative and the North Orange County CVRA Coalition. Miguel was born and raised in Santa Ana, California where he currently resides with his beautiful wife and two precious daughters. He received a B.S. in Civil Engineering from California State Polytechnic University, Pomona and teaching credential from California State University, Long Beach.

Shelley Hoss  
*President, Orange County Community Foundation*

Shelley Hoss has combined the best of the nonprofit and corporate worlds for the good of her community for nearly 30 years. Since May 2000 she has served at the helm of one of Orange County’s most prominent philanthropic organizations: the Orange County Community Foundation—which mission is to encourage, support, and facilitate philanthropy in Orange County. Under Hoss’ leadership, the Community Foundation has become recognized as a “center of gravity” for philanthropy in Orange County. Annual grant and scholarship awards have surged nearly ten-fold, from $5 million when she joined OCCF in 2000 to more than $59 million in 2015. During the same period, assets stewarded by the Foundation have increased from $43 million to nearly $250 million, and OCCF has now awarded more than $360 million in grants and scholarships since its inception in 1989. This dramatic growth has placed the Orange County Community Foundation as a stand-out among more than 750 community foundations across the nation, placing OCCF as the 12th most active grantmaker among its colleagues, and in the top 10% in total assets. Hoss served as founding chair of the Orange County Funders Roundtable, serves on the board of the League of California Community Foundations, and has been a regular guest lecturer at Stanford Graduate School of Business and the Merage School of Business at UC Irvine. She is a Phi Beta Kappa scholar with a joint Master’s Degree in Business and Public Administration from the University of California, Irvine.
Gene Howard
Executive Director, Orange County Alliance for Children and Families

Gene Howard’s successful executive leadership experience encompasses a wide spectrum of organizations from directing a statewide governmental organization of 900+ staff to leading a medium sized non-profit with a staff of 32 and an annual budget of $2.4 million. This background has equipped him to bring value to organizations of any size and to assist them with their most challenging issues. His previous responsibilities included leading the Child Protective Services Departments for the State of Arizona and Orange County California, serving as the CEO of the Orangewood Children’s Foundation for 13 years and of the Court Appointed Special Advocates of Orange County for 4 years. Most recently Gene has accepted the position of Executive Director of the newly formed Orange County Alliance for Children and Families. In this capacity he will be responsible for developing the organization from the ground up. In addition to serving as a “C” level executive in a number of organizations, Gene has also had the pleasure of serving as a member of the board for several non-profit organizations providing him with the perspective of a board member as well as that of a staff person.

Valerie Jacobs
Founder, Jacobs Consulting

Valerie Jacobs is the founder of Valerie Jacobs Consulting, a group dedicated to providing consultation support to individual philanthropists and family foundations. In addition, Valerie is a nationally known speaker, and has created a series of workshops and conferences for women of wealth and wealthy families, presenting them throughout the country. She has been featured in numerous books and publications including Forbes, Ms. Magazine, The Wall Street Journal, Kiplinger’s Personal Finance, The Chronicle of Philanthropy, The London Times, The Los Angeles Times and The San Diego Union. Valerie has served on her family’s foundation boards, the Jacobs Family Foundation and the Jacobs Center for Neighborhood Innovation, since 1988. The Jacobs Center for Neighborhood Innovation’s work has become a model in place-based philanthropy known for its resident-led approach to neighborhood revitalization. Valerie, her husband and two children created their own family foundation in 2007 focusing on international development.  She has been a licensed psychotherapist for over 35 years, specializing in the effects of wealth on relationships and personal well-being.

Edward B. Kacic, CAIA
President, Irvine Health Foundation

Ed Kacic is President of the Irvine Health Foundation (IHF). His responsibilities include oversight of all investment and financial activities as well as operational and strategy functions. Ed has managed foundations for over 35 years and has administered both domestic and international projects. Additionally, Ed serves on the Investment Committees of the Mardan Foundation of Educational Therapy and Alzheimer’s Orange County. Ed also previously served on the Board of Directors and as Board Chair of CalOptima. Ed received his MBA from the Paul Merage School of Business at the University of California, Irvine and has also earned the designation of Chartered Alternative Investment Analyst. The Irvine Health Foundation (“IHF”) is committed to improving the health and well-being of the diverse population of Orange County, California. In 2015, IHF celebrated 30 years of serving the Orange County community.
Admas Kanyagia
Associate Director, FSG

Admas Kanyagia is an Associate Director in FSG’s San Francisco office. She has over seven years of strategy consulting experience working across both nonprofit and government sectors. While at FSG, she has worked primarily in Catalytic Philanthropy and Collective Impact. She most recently supported a community in the Central Valley to launch and implement a collective impact effort focused on birth outcomes. Prior to FSG, Admas worked for Accenture’s nonprofit practice in Washington DC and for a local nonprofit affordable housing developer in Skid Row-Los Angeles, where she implemented an “early” collective impact project focused on chronic homelessness with 12 local partners. Admas has a Bachelor’s degree from Stanford University and a MPP from the Harvard Kennedy School.

Steven Kim
Director/Co-Founder, Project Kinship Orange County

Steven co-founded Project Kinship in 2014 to serve individuals impacted by gangs and incarceration, with the aim to successfully re-integrate them back into our communities. His dedication to breaking cycles of incarceration, gang membership and community violence stems from over 15 years of working with traumatized and abandoned youth throughout Orange County. Steven is highly regarded for his human rights work in the field of forensic social work where he led multi-disciplinary teams to identify early childhood traumas on high-profile-death penalty cases. He is sought out for his expertise on understanding root causes of violence and has facilitated trainings on the state and federal levels of the criminal justice system. He has held teaching appointments with the University of Southern California lecturing on best practices that focus on adolescent gang prevention and intervention strategies. Steven holds a Master degree in Social Work from USC.

Jason Lacsamana
Program Officer, St. Joseph Health Community Partnership Fund

As Program Officer for the St. Joseph Health Community Partnership Fund, Jason works with community organizations and institutions to positively impact the health and well-being of individuals and communities throughout California. In this role, he promotes collaboration amongst all sectors in achieving programmatic and policymaking success and supports efforts that build the capacity of community-based organizations, allowing them to become more stable, self-sustaining, and better advocates for regional needs. Jason has over 20 years of experience working to improve access, equity, and wellness in the region, both in the non-profit and philanthropic sectors. He earned a BA in History and a BS in Physiology & Neuroscience from UCSD, and completed his graduate studies from UCLA with a Master’s in Public Health. Among his affiliations and involvements, Jason serves as a member of the PBS SoCal Community Advisory Board. He has been recognized as Health Educator of the Year by the Society of Public Health Educators and was a recipient of the Civil Rights Leadership Award from the California Association of Human Relations Associations.
Paul M. Leon  
*CEO and Founder, Illumination Foundation*  
*Public Health Nurse, County of Orange Health Care Agency*

As a Public Health Nurse with the County of Orange Health Care Agency, Paul Leon spearheaded a unique program to bring health access and services to the homeless. He was instrumental in the creation of the Comprehensive Health Assessment Team for the Homeless (CHAT-H) and the Mobile Unit Teams (MUT) which bring targeted services to the underserved. On a national level, Paul served as a consultant for pioneering recuperative care with the Health Resources and Services Administration (HRSA) across the country and in Puerto Rico. Paul is the CEO and Founder of Illumination Foundation (IF), a non-profit organization whose mission is to break the cycle of homelessness. Through their programs, IF provides stable housing and wrap around services to families. Paul also pioneered IF’s Recuperative Care Program to manage the discharge of homeless hospital patients. He was recently recognized for IF’s work with the PIMCO Leadership Circle Award and the James Irvine Foundation Leadership Award. In addition to serving on several advisory committees for organizations including the UCI School of Nursing and the Mental Health Association of OC, Paul continues to work as an advocate for the issues of homelessness and healthcare. He consistently sheds light on these issues by mentoring students at CSULB, CSUF, Biola, Concordia, USC, and UCI. He also consults with CHOC’s Residency Program and Kaiser’s Resident Program, and serves on the Board of Directors for National Health Care for the Homeless Council (NHCHC). His goals are to continue researching and publicizing public health models to end homelessness.

Jennifer Li Shen  
*Partner & Co-Founder, Blue Garnet*

Jennifer cares most about making strategy real to create lasting social change. With over 18 years of management consulting experience, she brings a unique combination of expertise in strategy and organizational change with cross-sector experience. Jennifer focuses on serving as a trusted advisor to clients, and has recently worked with nonprofit and philanthropy clients in arts, education, and health and human services. She enjoys creating clarity on the “So What” question – defining tangible impact, the “secret sauce” of each client, and the economics behind the work of social change. Previously, Jennifer served Fortune 500 clients as a management consultant at Boston Consulting Group, where she developed business strategies and implemented organizational change. She was acting program manager for Fannie Mae Foundation and worked at TCC Group in corporate social responsibility and philanthropy. Jennifer is a Founding Partner and former Board Director of SVP Los Angeles. She has served on the Social Impact Exchange Contributions Review Team and the Terry McAdams Book Award Committee, and is a member of the American Evaluation Association. As adjunct faculty, she is co-teaching “Impact Thinking, Measurement and Evaluation” at Pepperdine University’s Masters program in Social Entrepreneurship and Change. Jennifer holds an MBA from Yale University and a BA in Political Science with concentration in Public Policy from Swarthmore College. As a wife and mother of four, she lives life to the fullest, and always strives to catalyze social change to create impact.
Colleen Mensel  
*President & CEO, El Viento Foundation*

Colleen Mensel leads El Viento Foundation’s strategic planning, operations, fund development and academic programs. She has served as President and CEO since joining the organization in 2011. Established in 1997, El Viento provides long-term educational support to students from the underserved Oak View community in Huntington Beach, Calif. Leading her daughter’s Girl Scout troop originally inspired Colleen’s passion for organizational success. She went on to serve for eight years as Executive Director of the Heritage Museum of Orange County in Santa Ana, Calif., before joining El Viento. Colleen grew up in Tempe, Arizona and is an alumna of Arizona State University. She and her husband live in Huntington Beach, and they have two daughters in college.

Sarah Middleton  
*Vice President, PIMCO*

Ms. Middleton is a vice president responsible for global corporate citizenship at PIMCO and is the executive director of the PIMCO Foundation. PIMCO is a global investment management firm, headquartered in Newport Beach, CA, and the PIMCO Foundation is the firm’s charitable giving and volunteering arm. Sarah developed PIMCO’s employee volunteer program and related corporate social responsibility initiatives, including a cross-border volunteer program, a skills-based program centered on financial literacy and college readiness, an annual Global Week of Volunteering, and a “PIMCO Parents” family volunteer team. On behalf of the PIMCO Foundation, she is part of the Points of Light Corporate Institute Leadership Faculty; she’s chair of the Orange County Funders Roundtable’s Program Committee; she’s a member of Philanthropy NY, the Global Corporate Volunteer Council and the International Corporate Volunteer Council. She is past chair of the Corporate Volunteer Council of Orange County and immediate past president of the Orange County Community Relations Council. Prior to joining PIMCO in 2007, she served as an AmeriCorps volunteer and worked in the nonprofit sector for six years. She was named by the OC 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.

Mary Niven  
*Senior Vice President, Disneyland Resort Operations*

Mary Niven is the senior vice president of Disneyland Resort Operations in Anaheim, California. In this role, she is responsible for leadership and integration of the overall Guest and Cast experience throughout the Disneyland Resort, overseeing the attractions, custodial, guest relations, merchandise, entertainment, food and beverage, and lodging teams. Mary came to the Disneyland Resort as vice president of food and beverage in June 2000 from the University of California – Los Angeles where she was director of dining services. She is nationally recognized for developing and successfully implementing the first “Marketplace” food concept in university residential dining in the United States. She was a founding member of the College and University Resource Board, regional president for the National Association of College and University Food Service, and has been a speaker at numerous national conferences. Mary also serves on the board for The Illumination Foundation. In 2005, she was selected by the International Foodservice Manufacturers’ Association as the 2005 Silver Plate recipient in the Specialty Foodservices category, a prestigious honor within the foodservice industry.
Kevin O’Grady  
*O’Grady Solutions*

Dr. Kevin O’Grady is the CEO of O’Grady Solutions offering consulting services to the Public Sector: Schools, Non-Profits and Government. He is especially passionate about non-profit advocacy, board development and fundraising (C3, C4 and Political fundraising). Dr. O’Grady is a recognized expert in anti-bullying/school climate work. Before launching O’Grady Solutions, he was Executive Director of the LGBT Center OC, the second oldest LGBT Center in the nation. In this role, he oversaw all programming, advocacy, development, and testing and prevention services, supervises all staff and is responsible for board relations. In his time at the LGBT Center, he increased the budget by 40%, bought in several $100,000+ grants, and opened a second site. He holds a Master’s Degree in Political Science from Cal State Fullerton and a Doctorate in Education from USC—his dissertation examined the condition under which teachers are willing to come out in the classroom.

Anne Olin  
*President and Chief Executive Officer, The Olin Group*

Anne founded The Olin Group in 2002 to strengthen nonprofit businesses in Southern California. Since that time, she and her growing team have helped deepen the capacity of organizations through services related to evaluation; grant strategy; marketing, branding, and communication; philanthropy; and planning, assessment facilitation. Her vision is a sustainable nonprofit sector that exercises its power to help communities solve problems and bring about lasting change. In addition to serving nonprofits, foundations, and public agencies through The Olin Group, Anne has served in a leadership capacity for The Nicholas Endowment, the Orange County Funders Roundtable, and the Orange County Shared Spaces Foundation, the latter which established the first multi-tenant nonprofit center in Orange County, The Village at 17th Street, whose relational and programmatic well-being is managed by The Olin Group. She also founded and serves as the Board Chair and pro bono Executive Director for Charitable Ventures of Orange County, a nonprofit fiscal sponsor that incubates regional initiatives. Anne holds a Bachelor of Arts degree in Political Science from the University of California, Irvine and a Master of Arts degree in American History with an emphasis in Immigration Policy from Claremont Graduate University and is a member of Phi Beta Kappa and Pi Sigma Alpha national societies.

Dan Oster  
*Performer*

Dan Oster performed as a cast member on the hit Fox sketch series MADtv as well as in Amsterdam with the famed international comedy troupe Boom Chicago, where he also acted as assistant director. Dan continues to write and perform comedy with the award-winning Los Angeles ensemble Lost Moon Radio. As an Improv instructor with over a decade of teaching experience, Dan has performed trainings for numerous companies including Philips, Intel, and AstraZeneca. He is always excited to deliver the message of agreement and support that is the bedrock principle of improvisation.
Cathleen Otero
Director of Donor Relations & Programs, Orange County Community Foundation

Cathleen brings 15 years of experience in supporting health and human service organizations through collaboration, coalition building, and strategic planning to improve performance and better serve vulnerable populations. She spent the last 10 years at Children and Family Futures, serving as the Deputy Director of the National Center on Substance Abuse and Child Welfare. Cathleen received her bachelor’s degree in psychology from Yale University and both her Master of Public Administration and Master of Social Work degrees from the University of Southern California.

Tennyson Oyler
President, Pacific Life Foundation

Tennyson Oyler currently serves as the President of the Pacific Life Foundation, the charitable giving arm of Pacific Life Insurance Company, headquartered in Newport Beach. The Pacific Life Foundation has provided over $90 million in community grants over the last 30 years, and will provide $6.25 million in funding to community programs in 2016. In his other role at Pacific Life, he oversees Pacific Life’s brand, corporate advertising, public and media relations, external corporate communications, community relations, and digital and social media efforts. He is a graduate of Brigham Young University and he received his MBA from University of California, Irvine.

Rigoberto Rodriguez Villalpando
Principal Consultant, The INNOVA Group, Inc.

Rigoberto Rodriguez Villalpando, Ph.D., M.U.R.P. is Associate Professor of Latina/o Public Policy in the Department of Chicano/a and Latino/a Studies (CHLS) at California State University, Long Beach. As an urban social and political geographer, Rigoberto focuses on how Latinos/as (immigrants and native born) participate in local civic and political processes and studies the form and effectiveness of community partnerships seeking to improve community conditions. Rigoberto is principal consultant for The INNOVA Group, Inc., a consulting firm that provides community and strategic planning support to public agencies, philanthropy, and social movement organizations that want to create policies and systems to improve conditions and outcomes for disadvantaged groups.
Robert Santana
Chief Executive Officer, Boys & Girls Club of Santa Ana

Robert Santana is one of Orange County’s most innovative social entrepreneurs and mission-driven CEO’s. Robert’s passion to impact the lives of youth led him to the Boys & Girls Club of Santa Ana, where for the last 10 years he has spent transforming his organization, innovating in his industry, and challenging the status quo. Starting as a volunteer mentor with the Club, Robert quickly saw the potential for what the Club could become. Robert believes that being a nonprofit is a tax status, not an excuse to run poorly as a business. Under Robert’s leadership, the Club has expanded from a single site with twelve staff and 130 kids to almost 75 professionals serving over 5,000 children annually at 45 locations. In addition to the expansion of sites and staff, the Boys & Girls Club of Santa Ana also introduced innovative programming such as their Impact Model, Family Strengthening Initiative, Early Literacy Intervention, College Bound, and most recently a coding and robotics initiative. Robert’s message to the staff and Board is that he doesn’t just want Club Members to be college and career-ready, he wants all Club Members to be global-ready.

Shawna Smith
Executive Director/CEO, Taller San Jose Hope Builders

Shawna Smith brings a combination of good business sense and compassion to her work advancing the lives of thousands of young men and women marginalized by the lack of job and educational opportunities and violence of their neighborhoods. Since 1998, Shawna has worked with Taller San Jose Hope Builders leading the development of numerous strategic initiatives including the organization’s nationally recognized model for workforce and educational pathway programming. For the past several years, Shawna has served as the organization’s executive director. In 2011, she launched Hope Builders Construction Company, a social enterprise and licensed general contracting venture that creates jobs for participants completing Hope Builders’ training programs. Hope Builders has grown significantly during her tenure, including, expanding operations into Anaheim in 2015 with the goal of doubling its service capacity. Shawna received her degree in English from Santa Clara University. She was named a Marano Fellow by the Aspen Institute in 2006. In 2012, she was named a 40 Under 40 Orange County by the OC Metro.

Daniel T. Stetson
Executive Director, The Nicholas Endowment

Dan is currently the Executive Director of The Nicholas Endowment. As a private foundation, The Nicholas Endowment is dedicated to providing support to charitable organizations that exemplify its mission and vision. Currently, Dan is also serving as Secretary of the Community Engagement Panel for the San Onofre Nuclear Generating Station. This panel was convened by Southern California Edison to serve as a conduit for public information and to encourage community involvement and communication during the decommissioning process. Last July, Dan retired from the Ocean Institute where he served as President and CEO since 2005, after having joined the Institute in 1992 as Director of Maritime Affairs. The Ocean Institute is an educational non-profit organization located in Dana Point, California that provides inspiring marine science and maritime history immersion programs for over 100,000 K-12 students annually. Immediately prior to his 23 year tenure at the Ocean Institute, Dan consulted for the law firm of Pillsbury, Madison & Sutro in Los Angeles. Dan has a BA from UC Santa Barbara and an MBA from California State University, Fullerton. Together with Roxanne, his wife of 30 years, Dan is an avid diver, sailor and tennis player.
Keith Swayne  
Co-Founder, Keith and Judy Swayne Family Foundation

Co-Founder of the Keith and Judy Swayne Family Foundation. Keith Swayne served as CEO of Case Swayne Co., a major developer and processor of specialty sauces and seasonings for the food service and industrial markets and its successor company, Universal Food Solutions, a subsidiary of BestFoods/Unilever. He is active in the community, the food industry and business in general, serving on a number of private company boards and non-profit boards. He was a regional winner of the Entrepreneur of the Year Award and was recognized by the California Association of Human Rights Organizations for his work in the Human Rights field. He has a Bachelors degree in Economics from the University of Oregon and an MBA from UC Berkeley. He served as an officer in the Navy with duty in Vietnam. He was married 50 years to Judith, who passed away in 2014 after a long battle with Alzheimer’s. They have two children and one lovely granddaughter.

Jack Toan  
Vice President and Community Affairs Manager, Wells Fargo Community Relations

As part of Wells Fargo’s Government and Community Relations team, Jack is responsible for managing over $6MM of the company’s charitable giving and volunteerism programs in the Southern California Region which includes Orange, San Diego, and Imperial counties. He also leads the company’s Military Affairs program for the West Region. Jack is a dedicated leader who is committed to responsible reputation management practices. He has a proven background in community development and corporate philanthropy. He believes in creating social changes through action and serves on several nonprofit boards in Orange County and San Diego. Jack holds an MBA from UC Irvine Paul Merage School of Business and is a graduate of the Southern California Leadership Network.

Ana Siria Urzua  
Campaign Coordinator, Santa Ana Building Healthy Communities

Ana Siria Urzua is a homegrown organizer. She began organizing as a high school student at El Centro Cultural de Mexico in Santa Ana, CA where she fused art, culture, and music in her work. After receiving her BA in Anthropology at UC Irvine, she worked for the Orange County Communities Organized for Responsible Development (OCCORD) on voter registration, neighborhood organizing, and policy reform. Her policy reform work with the Santa Ana Collaborative for Responsible Development (SACReD) led to an ordinance for greater transparency and participation in city governance and planning practices under the Sunshine Ordinance. Today, Ana serves as campaign coordinator with Santa Ana Building Healthy Communities, supporting policy advocacy focused on equity and health in Santa Ana.
Carla Vargas  
*Senior Vice President, Community Impact, Orange County United Way*

Prior to becoming Senior Vice President, Carla Vargas was Vice President of Investor Relations/Major Gifts, overseeing Orange County United Way’s major donor circles including the Tocqueville Society ($10,000+). Women’s Leadership Council, as well as relationships with Orange County’s million dollar roundtable donors and those donors, foundations and corporations wishing to make a special gift to a United Way community impact project. In this role, Carla created and launched new targeted affinity groups including industry groups (Bench & Bar and Real Estate Community Builders), women’s affinity groups (including the Women’s Philanthropy Fund and Women Looking Forward), groups to cultivate and secure endowment and planned gifts (Loyal Contributors, Tocqueville Legacy Circle and Legacy Circle), and the newest group of “under 40” leaders contributing at a leadership level to United Way (Emerging Tocqueville Leaders) and served on the United Way Worldwide Major and Planned Giving Staff Leadership Council. Previously, Carla worked in community program development and Community relations for Orange County United Way and has served as a volunteer and staff at several other granting, government and nonprofits locally and in the Bay Area in addition to serving as a part of the trademark/brand protection team at a boutique litigation firm. Carla holds a Bachelor of Arts in Political Science from the University of California, Berkeley and was recognized by OC Metro as one of Orange County’s “40 Under 40.” She is also a member of United Way’s Emerging Tocqueville Leaders.

Zoot Velasco  
*Chief Executive Officer, Muckenthaler Cultural Center*

Zoot Velasco had a 12 year artistic career as a live wax figure, mannequin model, break dancer on MTV for Prince and Michael Jackson, mime in films and commercials, performance artist in international shows, and manager of prisons arts programs now showcased in museum collections at the Getty, Hammer and Library of Congress. He built 4 new art centers in Los Angeles, and a theatre in Long Beach. He holds a BA in dance from St. Mary’s College, and an MBA from Hope International University and professional designations in arts education, fundraising, management and conflict resolution. He has raised over $25 million dollars for various nonprofits. As CEO of the Muckenthaler Cultural Center since 2007, he has more than quadrupling patrons, programs and members while tripling the budget, all during a bad economy. He has authored plays, poems and two books: One on the Muckenthaler history and one on nonprofit management. He teaches Nonprofit Management at Cal State Long Beach and Cal Poly Pomona.

Mary Vu  
*Director/Co-Founder, Project Kinship Orange County*

Born to Vietnamese refugee parents, Mary is a proud Orange County native. As a Licensed Clinical Social Worker, Mary is the first woman in her family to graduate with not only a degree, but also complete post-graduate studies. She holds Bachelor’s of Arts in Criminology, Law & Society from the University of California, Irvine and a Master’s in Social Work from the University of Southern California. She is dedicated to multilevel development and planning for the overall equity and sustainability of communities. She is no stranger to serving Orange County’s most marginalized communities; in particular, by helping those to heal with issues of domestic violence, child abuse, trauma and addiction. As Co-Founder of Project Kinship and an advocate for reform, Mary believes in systemically improving the opportunities of those individuals reentering communities by fostering individual transformation, hope and resilience.
Margie Wakeham  
*Executive Director, Families Forward*

Margie Wakeham has been the Executive Director of Families Forward since 1992. Her leadership has progressed the organization from a 2-person operation in a small donated office space to the present staff of 35 servicing families in crisis now housed in a 18,500 square feet, agency-owned Family Program Center. Prior to joining Families Forward, Ms. Wakeham was involved in local politics as a member of the Irvine Unified School District Board of Education. In her seventeen-year tenure, the district grew from 12,000 students to over 25,000. She also built the foundation for strong partnerships between the business community, the school district, and the city. Margie was a founding member of the Board of Directors for OC Partnership, now 211 OC. She served on the 10 Year Plan to End Homeless Committee and is active in the OC Continuum of Care. Ms. Wakeham’s unwavering dedication to community investment has been recognized by many. In 2013 Families Forward received the first Giving is Living Award from OneOC and in 2014 she was recognized as Founder of the Year at the National Philanthropy Day Luncheon. Ms. Wakeham has a B.A. in Sociology from the University of Oregon.

Ruchi Rastogi Warrier  
*OCFR Executive Administrator*

Ruchi Warrier brings experience in strategy consulting, organization development and international development to her role as Executive Administrator with the Orange County Funders Roundtable. A member of the Leadership Team at FSG, a mission-driven consulting organization, Ruchi served as the Chief Organization Development Officer leading professional development, recruiting, consultant staffing, administration, human resources, and facilitating leadership and culture development activities. Ruchi’s experience over the last 15 years span work with private and community foundations, non-profits, NGOs, and corporations on issues including strategic planning, corporate strategy, evaluations, and philanthropy. Prior to joining FSG, Ruchi was a management consultant with The Boston Consulting Group, where she served clients in the pharmaceutical industry and city governments. Her non-profit experience includes international programmatic and strategy work with the National Alliance of State and Territorial Directors, Centers for Disease Control and Prevention, International Center for Equal Healthcare Access and Acumen Fund working with partners in Asia and Africa. Ruchi holds an MBA and an M.A. in International Affairs from Columbia University, and a B.A. in Development Studies from the University of California, Berkeley.
Wheel of Change
A Model for Personal Transformation
Content provided by Robert Gass
For more information, see stproject.org/resources/tools-for-transformation

“One of the most difficult things is not to change society
– but to change yourself.” Nelson Mandela

The Wheel of Change is a powerful tool for facilitating individual transformation – our own and those with whom we may coach, mentor or support. At The 2016 Summit, we are asking philanthropic leaders to explore “How to Be a Change Agent” by introducing them to this tool of transformation, and exploring how change is made possible in our own lives and in the lives of our organizations.

The Wheel of Change is a systems approach to change. We humans are a complex system, encompassing an inner life (our thoughts and feelings), habits of behavior, and an external environment that has a huge impact on us. Systems by their nature tend to resist change. Most change efforts fail because they fail to address the system as a whole. We may experience what seems like progress, or even a breakthrough, but all too often the system, like a rubber band, tends to pull us back.

The Wheel of Change guides us to attend in an integrated way to each of these three domains:

1. **Hearts & Minds:** Our hopes and dreams, thoughts and feelings, what we believe is possible or impossible; the ideas, perceptions and beliefs that shape our experience.

2. **Behavior:** What we do and don’t do, our choices and habits, the norms and unspoken agreements by which we interact with others.

3. **Structures:** The external systems in which we live and work: the hierarchies, processes, practices and cultures of our organizations, communities and society.
Improvisation has been employed in the entertainment business in one form or another since as far back as the Middle Ages. Modern Day improvisation focuses mainly around the concept of ‘yes and’ which at its core is about the acceptance and support of new ideas. Players go into a show knowing they will agree with whatever happens and react to it. In the past thirty years, the non-entertainment business world has benefited from many of the fundamental techniques used by stage improvisers. Essentially, improvisers train themselves to be better listeners, and create ideas as direct inspiration from what happens before them. Improvisers must work well as a team in order to deliver a good show. In this training, two performers who have been active in improv for a combined thirty years of experience will lead exercises that help to clarify these concepts and sharpen the skills of active listening and idea building. The presentation will provide attendees with the tools to create a more productive and supportive work environment and will also be a lot of fun!

Resource Links

Real Cost Project – www.realcostproject.org

How to Become a Nonprofit Rockstar – http://nonprofitrockstartour.com/

Leadership
• The Nonprofit Leadership Development Deficit from Stanford Social Innovation Review
  http://ssir.org/articles/entry/the_nonprofit_leadership_development_deficit
• Personal Renewal by John Gardner
  http://www.pbs.org/johngardner/sections/writings_speech_1.html

Development
• Making Big Bets for Social Change from Stanford Social Innovation Review
  http://ssir.org/articles/entry/making_big_bets_for_social_change

Evaluation
• Blue Garnet www.bluegarnet.net
• FSG www.fsg.org
• Paul Harder + Company www.harderco.com

Collective Impact
• Collective Impact Forum
  http://www.collectiveimpactforum.org/resources/collective-impact-shared-resources
• Equity in Collective Impact
  http://ssir.org/equity_and_collective_impact
• Collective Insights for Collective Impact
  http://ssir.org/supplement/collective_insights_on_collective_impact