



ORANGE COUNTY BUSINESS JOURNAL

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COMPANIES THAT CARE



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MSI Leverages Import Connections to Aid Community

Provides Support, Funds To Health, Frontline Workers

■ By KARI HAMANAKA

Knowing how to source and import materials from all around the world is a good skill to have in the middle of a pandemic.

Just ask Orange-based building materials distributor **M S International Inc.**, which used its resources to help bring masks and other medical supplies to first responders and front-line workers.

That included more than 300,000 face masks and shields worth about \$90,000 for **Providence St. Joseph Hospital** in Orange at the height of the pandemic. The company also worked with nonprofits to administer the vaccine.

“We leveraged our position as one of the largest importers of goods into the U.S. to import medical supplies, specifically masks, which in 2020 they were difficult to get,” said MSI Vice President of HR **Chris Courneen**.

Giving continued into 2021; MSI reported cash donations within OC totaling more than \$400,000, with the company focused on initiatives where it could provide assistance with shelter, food, education and technology.

Nearly that amount was also provided via way of in-kind donations during the course of the year.

While the company helped with medical supplies and feeding first responders, it’s also provided Chromebooks and iPads to more than 500



MSI partnered with Orange Senior Center to donate 100 refurbished iPads to adults 50 and older during the pandemic

employees in OC, 100 iPads to the **Boys & Girls Club** and, beginning in April, there have been scholarships for high school seniors at **Tustin Public Schools Foundation**.

Employee Involvement

The company’s employee matching program during the pandemic led to a major push to raise funds across the communities MSI employees reside to help get a number of students online.

“That was another instance where MSI as a company and the employees came together, with a focus on tech and education. The CEO and founder inspired the employees to come together,” said **Bhavik Muni**, portfolio manager of grantmaking at the company.

Muni works with the company’s founders, **Manu Shah** and **Rika Shah**, along with Courneen, on identifying various initiatives for MSI to get involved.



MSI’s Charitable Trust ‘aims to improve and strengthen the health, education, and wellness of communities we live and work in,’ company says

Courneen said where MSI chooses to donate goes back to the story of the company’s founders, who came to the U.S. in the 1970s from India for their education.

“Having that experience moving to the U.S., [and] education allowed Manu and Rika to become entrepreneurs and start a successful business. Creating jobs and opportunities became their life’s mission,” Courneen said.

MSI is one of OC’s largest private companies with over \$2 billion in annual revenue; it imports natural stones from dozens of countries to serve a customer base of thousands of retailers, distributors and fabricators that use its building materials.

Community Support

Another element of giving back to the community “is inherently caring for the communities that have cared for them and supporting the communities that have supported MSI,” Courneen said.

“It’s just the morally right thing to do and that runs strong through the core veins of who the organization is at its foundational level. I think

there is also this idea of not just incremental, small change, but seeking out opportunities to help with very large change and looking for opportunities to make very big impacts.”

Including and encouraging employees is a part of that, and done through a number of internal programs.

MSI will match dollar for dollar any monies donated by employees to a non-profit. More recently, employees who receive bonuses can elect to funnel some of that money to a charitable organization, with the company also offering a match. That idea in particular came from an MSI worker. There’s also an annual toy drive. An internal intranet site helps keep employees across the offices engaged and informed.

“We encourage employees to get involved and how we do that is either by offering financial support from the company, or letting them do this on company time,” Courneen said. ■

M S International Inc. MSI

- **BUSINESS:** flooring, wall, countertop distributor
- **HEADQUARTERS:** Orange
- **FOUNDED:** 1975
- **CO-FOUNDER/CEO:** Manu Shah
- **OC/COMPANYWIDE EMPLOYEES:** 550/2,800
- **REVENUE:** \$2B+
- **NOTABLE:** donated more than \$700K this year to various groups within OC

Applied Medical’s Services Go Beyond Healthcare

Charitable Acts Aim For ‘Meaningful’ Difference

■ By AUDREY KEMP

Medical device giant **Applied Medical Corp.** says innovation and its life-saving products are just the beginning of its mission to make a “meaningful, positive impact” in the community.

It must also give generously to the local community, officials say.

The company, established in 1987, manufactures medical instruments for minimally invasive procedures for over 80 countries.

Counting over 3,400 employees at its Rancho Santa Margarita headquarters and facilities in neighboring cities Lake Forest and Irvine, it’s RSM’s largest employer, and is Orange County’s second-largest medical device maker by employee count.

Also striving to be one of the “most progressive organizations in healthcare,” Applied Medical has over 170 nonprofit partners around the world that it supports through volunteer hours, financial support, and in-kind donations.

All organizations “echo [the] team’s mission,” Applied Medical Group President **Dima Hilal** told the Business Journal via email. “And we’re honored to play a small part in [their] life-changing work.”

‘Passionate, Giving individuals’

This year, Applied Medical donated 50 bags of clothing to **Casa Teresa**, 322 stuffed animals to **Crime Survivors**, 260 care packages for **YANA Cancer Comfort**, 400 pounds of food to the **Solana Food Bank**, and much more.

The company also gave 18 backpacks filled with school supplies to **Project Hope Alliance**, **Chromebooks** to local schools, and meals from



Fundraising bike ride for kids

its café, **RSM Cares**, to local teachers.

“We are fortunate to have a team of passionate, giving individuals who jump at every opportunity to give back—whether it’s donating to a food or clothing drive or volunteering at a local event—and we are happy to provide them with the opportunities, time and support to do so,” said Hilal, the niece of Applied President and CEO **Said Hilal**.

“We are truly thankful to have a culture of caring team members who make it a priority to serve our Orange County and global communities.”

COVID-19 Response

To help during the pandemic, Applied Medical gave away over 300,000 PPE items and COVID-19 testing supplies to 61 local organizations, businesses and residents.

“We have always been uniquely positioned to weather many storms,” Hilal said. “This stability

has empowered our teams to come together during even the most difficult of times with flexibility, responsiveness and caring to address disruptive situations while continuing to meet the needs of patients and caregivers.”

With its partner, **Free Wheelchair Mission**, Applied Medical provided over 90,000 of its house-made face shields to hospitals to some of the world’s most underserved areas, from Eswatini and Pakistan to the Dominican Republic.

“We were built on a mission of making a difference and we won’t stop short of that,” Said Hilal told the company’s healthcare partners and customers during the early days of the pandemic.

A Culture of Giving

In addition to its outreach, Applied Medical ensures its workforce feels supported from within.

In 2019, Applied Medical’s **Family Re-**

Applied Medical Corp. Applied Medical

- **FOUNDED:** 1987
- **CEO:** Said Hilal
- **HEADQUARTERS:** Rancho Santa Margarita
- **BUSINESS:** medical devices
- **OC/COMPANYWIDE EMPLOYEES:** 3,600/4,800
- **NOTABLE:** RSM’s largest employer strives to give back to community

source Center opened its doors to offer workshops, support networks and other resources to its workers and their loved ones, according to Dima Hilal.

That resource became “even more vital” during the pandemic as team members and their families needed grief counseling and mental health workshops.

The Family Resource Center also hosts an annual Community Resource Expo, such as **Alzheimer’s Orange County**, **Olive Crest** and the **Shea Center**, to bring to light the important role each local nonprofit plays.

This year’s event drew 440 Applied Medical employees, Hilal said.

“We know that a healthy company is made stronger through a healthy community,” the company says.

As such, “we are active partners in the communities,” it says, noting that it provides internship opportunities to college students, and invites schools and community groups on-campus for tours of its manufacturing facilities.

“Applied Medical is more than a company to work for,” one community relations team member said on the company’s website. “They truly care about their team members and the community.” ■



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Experian Aims for Financial Inclusion

Helps People Boost Credit Scores;
Employees Choose Outreach

■ By KEVIN COSTELLOE

Craig Boundy, the chief executive of credit reporting giant **Experian North America**, says his company, with 1,300 local workers in Costa Mesa, helps ordinary people with financial inclusion.

"We stand for helping people everywhere be included in the financial ecosystem," he told the Business Journal on Dec. 6.

To that end, he singles out **Experian Boost**, a financial tool that allows people to improve their credit scores, adding it is "free and easy to use."

The service launched in 2019 allows Experian to include users' on-time payment history from utility and telecom bills, as well as payments for streaming services, when building their credit scores.

As of earlier this year, the Boost program had helped nearly 4 million people in the U.S. grow their FICO score by nearly 50 million points, in turn giving them the opportunity to get a better chance of a loan approval or more attractive interest rates and terms.

Credit Education

While Boundy cites that key program as one point of the company giving back to the



Craig Boundy
CEO
Experian North America

Free program allows consumers to improve credit scores, helping with loans, payment terms

community, Experian also runs a host of other programs that benefit the area, having given close to \$600,000 in donations within OC this year.

Of note, Experian awarded two Orange County-based organizations with grants this year—the **OC Hispanic Chamber of Commerce** and **TGR Foundation**, the education-focused charity founded by **Tiger Woods**.

The funds are for scholarships, events and programs that support credit education, small business entrepreneurship, homeownership, and financial inclusion efforts.

The company's **Asian American Employee Resource Group**, meanwhile, raised thousands of dollars through #FeedYourHos-

pital, which supported Asian-owned restaurants that were affected by anti-Asian racism, and provided meals to front-line healthcare workers at hospitals in Orange County.

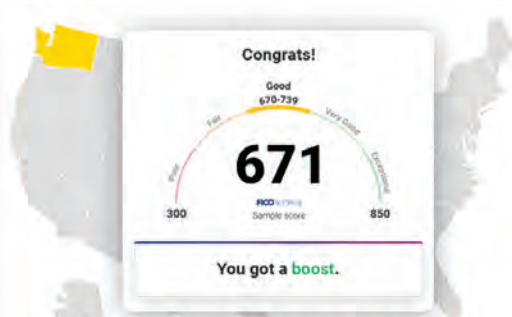
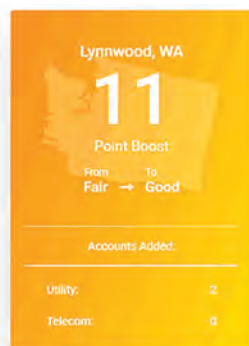
In total, Experian employees volunteered more than 900 hours to Orange County-based nonprofits and the company matched funds to those organizations that employees volunteered with and also donated to.

"Our people want to give back to the communities that they're part of," Boundy says.

The beneficiaries are chosen by groups of Experian employees. The in-kind donations within OC came to \$80,000 this year.

"They're not centrally or corporately decided things," Boundy said. "They're part of what our employees want to do."

"The payback is simple," according to Boundy.



Millions of points already
boosted across America

Experian



- **FOUNDED:** 1980
- **NORTH AMERICA HEADQUARTERS:** Costa Mesa
- **CEO OF EXPERIAN NORTH AMERICA:** Craig Boundy
- **BUSINESS:** credit reporting, information services
- **EMPLOYEES:** 1,300 in Orange County; more than 6,000 in U.S.
- **FY21 REVENUE:** \$5.4B (Experian PLC global revenue)
- **NOTABLE:** sees results from community outreach efforts

In-House Efforts

Among internal efforts, the CEO emphasized that the Experian team successfully negotiated the challenges of the pandemic.

"Nobody at Experian missed a beat," he said. "We've continued to perform well."

"Our people continued to do a great job. We continued to pay bonuses. We continued to give people pay raises," Boundy says.

He adds: "In appreciation of their efforts, we issued a 'Thank You' Share Award to employees this year to recognize perseverance through the pandemic," according to the CEO.

"Our business grew all the way through the COVID pandemic."

He said employees still have widespread flexibility in dividing their time between working from home and in the office. ■



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Slick Marketers: The Small Franchise Marketing Agency Blazing Their Own Trail Through North America

Written by Abby McCormick

Founded in 2011, Slick Marketers is a marketing agency based in Rancho Santa Margarita, California. They are a results-driven, highly innovative, and customer-focused team of marketing experts who help their franchisee clients achieve (and exceed!) their objectives. With their fresh and creative approach to franchise marketing, they've developed an individualized strategy to serve each client. Slick Marketers is rapidly expanding their reach through results-driven marketing programs that most other agencies don't offer - including intensive customer market research to understand each business and the target market's mindset.

Slick Marketers has very humble beginnings in Orange County. Having started her company after working in the corporate marketing world, President Nikki Ong's main goal was to deliver the best marketing results to all businesses, big and small. The team started marketing for a few franchise locations in Brea, Lake Forest, Tustin, Cypress, and Mission Viejo. Slick Marketers has developed a marketing system that their clients love and depend on. Since their start, they have partnered with 250+ franchise operators working in industries including beauty, restaurants and more! No matter the industry, they continue to expand and blaze their own trail.

SMALL MARKETING AGENCY WITH A BIG BUSINESS IMPACT

As a small business, Slick Marketers is able to quickly adapt with each market to grow their clients' businesses. Furthermore, they are well-versed in developing local franchise brands and setting it apart from the competition. All things considered, they make the marketing process simple and effortless, regardless of what stage a franchise is at in their business journey.

"The Slick Marketers team are great thought partners, relentlessly focused on outcomes, and customer obsessed. They have a plan, are focused, and execute their plans methodically, ultimately delivering results for my business!"

NICK FOSTER | FRANCHISE OWNER

Slick Marketers supports their clients with a highly scalable infrastructure. As their client base grows, they grow, too. Sustainable growth guarantees quality and service unmatched by competitors. Slick Marketers' greatest impact is found in their team of easily accessible account managers and specialized innovation: from understanding each local market to extensive outreach and creative campaigns, each business gains an individualized marketing strategy that delivers impactful results.

MARKETING SERVICES THAT DELIVER POSITIVE RESULTS

Specializing in strategic marketing services, Slick Marketers dedicates themselves to building and connecting with the local community through various campaigns, including social media marketing and advertising, Google Adwords, content writing, email blasts, and more. Slick Marketers' personalized services - including com-

petitive analysis, engagement, and organic outreach - allow them to remain dedicated to their clients and, by extension, their clients' franchise brand. While Slick Marketers primarily focuses on new client acquisition, they understand the importance of retaining existing customers and offer customized retention programs.

"Slick Marketers has done everything we hoped for and more. Our monthly requests for information from quality prospective clients more than doubled from the previous two year average. We highly recommend Slick Marketers."

KEVIN VOGLER | FRANCHISE OWNER

SUPPORTING OVER 250+ FRANCHISE LOCATIONS & GROWING

Slick Marketers works to help support franchises across North America. Currently, they manage accounts in 250+ locations across America and Canada, including 34 states and territories. With the knowledge they have gained over the years, they have used their proven marketing strategy to build brand awareness and help their clients achieve their business goals.

"Awareness in the community has greatly increased and with that comes great success."

DANIEL ZECH | FRANCHISE MANAGER

Their marketing model puts great value in brand awareness and building relationships with their client's local market. Clients are enthusiastic about their own business' growth and success. Slick Marketers continues to expand their reach in the franchise marketing world.

A COMPANY THAT CARES ABOUT THEIR COMMUNITY

When it comes to their clients and their local community, Slick Marketers is truly a company that cares. When Nikki Ong began her company, she was determined to make charity a huge part of the company culture. As the company has grown, so has their dedication to organizations that matter to their team.

"Nikki and her team are fantastic! They are so easy to work with. They are very talented and passionate about what they do."

SCOTT STEPHENSON | FRANCHISE OWNER

As a way to involve clients in local causes, Slick Marketers held a \$10,000 Charity Donation Giveaway at the Sola Salons Summit in Beaver Creek, CO. Franchisees were excited by the opportunity to win \$5,000, \$3,500, and \$1,500 donations to Orange County charities. The winners selected The International Society for Children With Cancer (Irvine), the Wyland Foundation (Rancho Santa Margarita), and Laura's House (Aliso Viejo) to receive these gifts.

A MARKETING AGENCY YOU CAN COUNT ON

At Slick Marketers, you can expect quality marketing services with clear communication, direct and informed decisions, strategic plans, and unmatched customer service that is invaluable to growing your business. If you are looking for a marketing agency to help with all of your marketing needs, Slick Marketers is the best choice for your business's growth!



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AAG Finds Calling in Serving Senior Citizens

Founder Says Purpose Driven More Fulfilling

■ By PETER J. BRENNAN

Reza Jahangiri has no hesitation when it comes to suggesting where his 2,000 employees at **American Advisors Group** (AAG) should volunteer their time—to help senior citizens.

“We’re a mission-driven business,” Jahangiri told the Business Journal. “Our purpose is to help seniors have a better retirement. A lot of seniors [are] having bad outcomes. We put seniors before the pursuit of making money.”

This year, AAG has been working with the **Meals on Wheels** non-profit and partnered with **United Way** on its **United to End Homelessness** campaign, focusing on providing long-term supportive housing to homeless seniors and veterans through the **Welcome Home OC** initiative.

AAG says its core values are “Caring, Driven and Ethical.” Its executives encourage employees to make a difference in the lives of its customers and communities.



Reza Jahangiri
Founder, CEO
American Advisors
Group



Each week, AAG team members take a break from their work schedules to deliver food and provide safety checks on seniors through local chapters of Meals on Wheels America

The company provides support of time, money, and resources to many local, national and global organizations.

“We provide paid time off for philanthropy,” Jahangiri said.

Immigrant Family

Jahangiri was about three months old when his parents had to escape Iran in 1978.

“Being born to immigrant parents who had to flee a company and start all over, you really value freedom and democracy,” he said.

A **University of California-Irvine** graduate with a Bachelor of Science in economics, Jahangiri initially knew little about the reverse mortgage sector. After researching it, he learned how it can help senior citizens tap into the equity in their homes to better enjoy their final years.

In 2004, he started American Advisors to

“help address the financial crisis of a growing 65-and-older population,” using what Jahangiri said was an underutilized asset in the form of home equity.

The reverse mortgage industry has seen its fair share of critics due to high fees. However, Jahangiri pointed out that while the industry was tarnished in prior years by some bad apples, nowadays it is more heavily regulated and has a strict code of ethics.

His company grew by featuring actors such as **Tom Selleck** and the late **Fred Thompson** in TV advertisements. In 2019, the Business Journal honored him with an **Excellence in Entrepreneurship** award.

The company will generate about \$700 million in revenue this year, according to Jahangiri.

“Having a purpose-driven company is more fulfilling for everybody involved,” Jahangiri said. “I myself focus on community, senior issues, human trafficking. It’s important for our employees to have an outlet to give back.”

Community Support

AAG also provides significant support to OC-based **Willow International**, a nonprofit organization dedicated to eradicating human trafficking from Uganda.

“I experienced the atrocity of trafficking in Uganda in 2011,” he said. “We want to revive the lives of people sold off from their families. I’m personally committed.”

Locally, AAG supports **Octane**, the area’s

top technology and medtech business accelerator, in its efforts to grow OC’s innovation ecosystem. Within the **Octane Foundation for Innovation**, AAG is a founding member of the “Next Wave Leaders” initiative, which is distinguishing OC by inspiring a purpose-driven, intentional leadership culture built on a platform of diversity, equity, and social consciousness.

AAG also participates in the **CEO Leadership Alliance Orange County**, an organization dedicated to building a “thriving Orange County for all.”

In the arts, AAG supports the **Pacific Symphony** and the **UCI Claire Trevor School of the Arts**.

For its employees, the company in 2015 established the AAG Foundation to encourage its workforce to make a difference.

“I care about our community and if my kids will be thriving here 30-40 years from now,” Jahangiri said. ■

American Advisors Group

- **FOUNDED:** 2004
- **FOUNDER/CEO:** Reza Jahangiri
- **BUSINESS:** reverse mortgages
- **HEADQUARTERS:** Irvine
- **EMPLOYEES:** 2,000
- **2021 EST. REVENUE:** \$700M
- **NOTABLE:** provides paid time off for 2,000 employees to volunteer



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Education Tops List for ViewSonic Outreach

Monitors, Support Make Their Way to Students

■ By KEVIN COSTELLOE

Jeff Volpe, the president of **ViewSonic Americas** in Brea, says “a great deal of our charity efforts revolve around education.” “We’ve been very active in schools or districts that have had challenges with meeting their budget requirements to acquire technology like what ViewSonic sells,” Volpe told the Business Journal on Dec. 7.

ViewSonic, with nearly 100 employees at its local base, is a provider of desktop monitors, interactive displays and non-touch commercial displays, software and value-add accessories for customers.



Brea Olinda Unified School District a recipient of tech products from ViewSonic

Their products are increasingly in demand at school districts that oftentimes don’t have the resources to buy the newest technologies.

To help, the company has supported multiple schools, after-school programs, STEM, STEAM, robotics, and coding clubs with a variety of products.

The ViewSonic Professional Development team has been providing teachers with on-demand, online support on topics that included the basics of distance learning, interactive tools, curriculum development and execution.



Jeff Volpe
President
ViewSonic Americas

It’s provided scholarship funds, as well as funds for food—ViewSonic is a supporter of Chef **Bruno Serato’s Caterina’s Club**, the Anaheim charity that feeds

nearly 5,000 kids a day.

The company’s charities and efforts fall under the **Empowering Future Generations** initiative that began two years ago, when the company pledged \$500,000 in technology to financially pressed “Title 1” schools, including after-school and related programs.

“It’s important that our children get an opportunity to see what technologies are out

there and what technology they’re going to be using to learn, but in turn what kind of technologies they’re going to be leveraging when they’re in the workspace,” Volpe said.

Next Up

ViewSonic will kick off its “United by Play” initiative with a “battle for charity” tournament at the giant **CES** tech show in early January with a tournament at the **HyperX** arena in Las Vegas with various partners.

The event will raise money for gaming-focused charity **LANFest**, the **Starlight Foun-**

dation, 1,000 Wishes, Stack up, Boys and Girls Club and **Paws Your Game**.

The charity and outreach programs represent a “chance to give back where people don’t have that opportunity” while at the same time students can become “more technically astute,” the exec said.

“Familiarity with our brand while someone is in education doesn’t hurt us. But that’s not our primary motive, for certain,” Volpe said.

“I do see charity and community work as something that inspires employees to do the right thing.”

Employee Satisfaction

The community work has resonated well with ViewSonic’s employee base.

ViewSonic ranked No. 22 on the Business Journal’s latest list of Best Places to Work in Orange County, in the midsize company category. Company perks range from a lunch at Thanksgiving time to giving all employees red envelopes with some cash inside to celebrate Lunar New Year and a comprehensive healthcare plan.

Volpe said the company is “doing very well” and sees value in a “hybrid workplace” where employees split time between working at home and in the office. ■

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ViewSonic

- **FOUNDED:** 1987
- **HEADQUARTERS:** Brea
- **EMPLOYEES:** 96 in Brea; globally 1,185
- **PRESIDENT OF VIEWSONIC AMERICAS:** Jeff Volpe
- **BUSINESS:** monitors, projectors, digital signage, ViewBoard interactive displays, and myViewBoard software ecosystem among other products
- **NOTABLE:** outreach efforts include tech-related education



Casco Contractors Founder Takes a Dive for Charity

Cheryl Osborn Builds Charities Into Company's Culture

■ By PETER J. BRENNAN

Cheryl Osborn wore a wetsuit to work one day this November.

The founder and owner of Irvine-based **Casco Contractors LLC** was the prime target for a dunking at the company's 7th Annual Beer for Bucks fundraiser.

Her employees and subcontractors didn't sandbag her either.

"27 times" she was plunked into the dunk tank.

"I figured a lot of people would love the chance to dunk me," she told the Business Journal.

That event raised \$90,000 to help charities including **Colette's Children's Home** and the **Make-a-Wish Orange County and the Inland Empire** foundation.

The company, which also has fundraisers such as Chili Cook-Offs, over the years has supported a variety of nonprofits like **Laura's House**, **Habitat for Humanity** and **Girls Inc.**

Casco Contractors says it integrates philanthropy "into its very core culture."

The 55-person firm gave more than \$130,000 in cash donations to local groups over the past year, in addition to other forms of giving.

"It's really important for companies to lead



Osborn climbs into the dunk tank and then faces the consequences

by example," Osborn said.

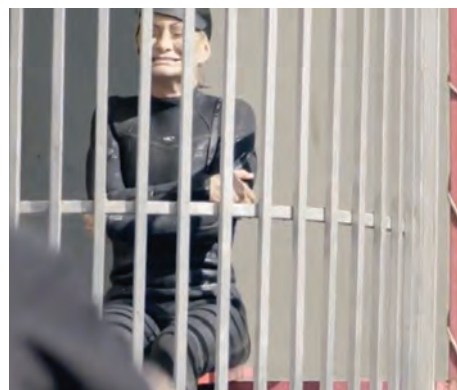
Kitchen Table Founder

In 2000, Osborn, who was then a new mother, founded Casco Contractors at her kitchen table.

Osborn created the trademarked "Count-down to Zero" approach, an incentive-based program that rewards teams for completing projects "with zero items remaining on the punch list," Casco's website says.

Twenty years later, the company has grown into one of Southern California's largest tenant-improvement companies. It has helped build offices for a wide range of notable local companies, from **Chipotle** to **KBS Realty to Inari Medical**.

She is the sole owner of Casco, which this year ranks No. 11 on the Business Journal's annual list of women-owned businesses and



No. 7 on tenant-improvement contractors.

Where to Start

Osborn, who credits her parents with being "very charitable," often introduces her employees to charities, which made seven presentations to them this year.

"A lot of employees don't really know where to start," Osborn said. "They see my leadership team and I care about giving to charity."

Each employee receives a one-day paid volunteer day. The employee discusses at the company's monthly meetings what charity they volunteered for and why they selected that one.

Casco also holds **Red Cross** blood drives quarterly and has a Green Task Force that comes up with ideas such as beach walk cleanups.

Duct-Tape Boats

When the company hosts a team-building competition at its annual company meeting, the winning team picks the charity that the company will support that year.

This year, it held a boat scavenger hunt held at Newport Dunes where teams had to make boats out of cardboard and duct tape and then sail them.

The winning charity this year was **Colette's Children's Home**, a Huntington Beach nonprofit that helps homeless women and mothers and their children reach self-sufficiency.

It also annually supports the **Make-A-Wish Foundation**.

"I had several friends who had kids make a wish—I saw how impactful it was," Osborn said.

"I've always wanted to help people. I tend to select charities about women and children." ■

Casco Contractors LLC



- **FOUNDED:** 2000
- **FOUNDER/PRESIDENT:** Cheryl Osborn
- **BUSINESS:** tenant-improvement contractor
- **EST. 2021 REVENUE:** \$50M
- **EMPLOYEES:** nearly 60
- **NOTABLE:** among OC's larger TI contractors, and women-owned construction-related businesses

IREM Orange County hosted our first IYP & D.E.&I. Summer Mixer Charity Event which raised over \$1,600. We also had our Annual Charity Golf Tournament and would like to thank all of the sponsors and golfers who helped raise over \$4,000 from raffle and silent auction item donations. With our combined efforts, we were able to raise \$5,700 to support HomeAid's cause. HomeAid is a leading nonprofit developer of housing and programmatic facilities for people experiencing or at risk of homelessness, operating through a network of 19 Affiliates in 13 states. HomeAid's mission is to help people experiencing or are at risk of homelessness build new lives through construction, community engagement, and education.

For more info on HomeAid, please visit: www.homeaidoc.org



iremoc.org | info@iremoc.org



Pacific Dental Gives People More Reason to Smile

\$77M of Donated Dentistry Performed Since 2011

■ By AUDREY KEMP

Pacific Dental Services knows well that smiles play a big role in first impressions.

The Irvine-based dental support organization or DSO—which builds and manages office practices for dentists, taking care of just about everything except the actual dentistry—encourages clinicians it partners with to restore smiles for those in need.

Since the organization established **Smile Generation Serve Day** in 2011, PDS-backed dentists and clinicians have performed nearly \$77 million of pro bono dentistry, according to **Kyle Guerin**, director of corporate social responsibility at PDS and executive director of the company's nonprofit, the **PDS Foundation**.

"Whether it's growing up in poverty and not having good oral health habits, or damage caused by drug use, the impact we can have on their lives is astounding," Guerin told the Business Journal.

"By giving them a new smile, we can help them get a job, build their confidence or overcome their fears."

That's not all PDS does to serve the community. This year alone, the company gave over \$100,000 in cash and in-kind donations to groups within Orange County.

It's also a financial supporter of several charitable organizations, including **Special Olympics International**, **Charity Water**, and **After Innocence**.

Three Ds

Its initiatives underpin its founding framework dubbed the Three Ds: "dentistry, donate and do something."

"Who we are as an organization is to give back," Guerin added. "Our president and CEO **Stephen Thorne** is leaving a legacy beyond just a profitable business. We want to leave a legacy of service, and know we left an impact on the world around us."

Since Thorne founded PDS in 1994, it's grown to become the third-largest DSO in the nation, with over 800 offices in 24 states.

"It's an incredible organization that's grown from the ground up," said Guerin, who has been with the company for 12 years. "It's a testament to Steve's leadership and team."

PDS Foundation

According to Guerin, the PDS Foundation has three main programs: **Special Needs Dentistry**, **Dental Assistant Scholarships** and **International Service Trips**.

The special needs dentistry program, its most comprehensive offering, aims to improve care for individuals with disabilities by training dental professionals and advocating for the special needs community.

"Sadly, individuals with intellectual or de-



PDS CEO Stephen Thorne, second from right, at prior Smile Generation Day event

velopmental disabilities have been under-cared for far too long," Guerin said. "This amazing group of individuals is getting these challenges brought to the open."

The foundation last month completed a virtual 5K called the **Stroll for Special Needs**, which raised over \$200,000 for the cause.

Another initiative is \$5,000 scholarships, which are granted to those interested in becoming dental assistants; 50 have been given away this year, according to Guerin.

PDS employees are also encouraged to

► PDS 82

OC CHARITY SCENE >> THE BUSINESS OF GIVING

Advertising Feature

Mixing Charity and Elevators is Par for the Course

On November 10 the annual Mitsubishi Electric US, Inc. Elevator & Escalator Charity Golf Tournament returned for another exciting year of golf, charity and camaraderie. Proceeds from this year's tournament benefited Folds of Honor and Warrior Dog Foundation, both of which aim to positively impact the lives of veterans. It was a beautiful day in support of two fantastic organizations and making a difference in the community.



Date of Event: November 10, 2021

Attendance: 140

Location: Strawberry Farms Golf Club, Irvine



Warrior Dog Foundation Representatives



Golfers & Volunteers



Team of Veterans



Launching for Charity Hole. Volunteer Team Members: Mitsubishi Electric US, Inc. Elevators & Escalators

Thank you to all of our sponsors for their support!

HOW YOU CAN GET INVOLVED

For information on how to sponsor or volunteer contact:

MitsubishiElevatorsMarketing@meus.com

Pacific Dental Services



- **FOUNDED:** 1994
- **CEO:** Stephen Thorne
- **HEADQUARTERS:** Irvine
- **BUSINESS:** dental practice management
- **EMPLOYEES:** 2,627 in OC, 12,861 nationwide
- **NOTABLE:** helped to provide \$77M worth of free dental work to date

2021 COMPANIES THAT CARE

Agapay*Tustin*

Payment Processing/Merchant Services

Agapay donates 5% of gross profit on each transaction to a charity of choice. In addition, the company provides weekly donations to more than 10 organizations in Orange County.



Alignment Healthcare

Alignment Healthcare*Orange*

Healthcare

Alignment Healthcare was founded in 2013 with a single purpose in mind: to improve health care one person at a time. Alignment pursues this unwavering calling by serving those who need it the most – the senior – and caring for them as if they were their own mom or dad. This commitment to serving seniors in the community continues through their longstanding partnership with Meals on Wheels Orange County, formerly known as SeniorServ.

**American Advisors Group***Irvine*

Mortgage

In addition to the charitable work of the AAG Foundation, the company provides support of time, money, and resources to number of local, national, and even global organizations. Locally, AAG partners with and supports United Way, Willow International, Octane, CEO Leadership Alliance Orange County, Pacific Symphony, the UCI Claire Trevor School of the Arts and others.

**AO***Orange*

Architecture Firm

AO has nurtured a long-term relationship with the Friendly Center, a local nonprofit based in Orange providing stability, opportunity and hope to children and families in poverty for almost 100 years. Since 2014, AO has held an annual Friendly Center Food Drive and Fundraiser, collecting more than 45,000 food items and raising more than \$44,000 for the nonprofit to-date.

**Applied Medical***Rancho Santa Margarita*

Medical Devices

Applied Medical and its team support more than 170 charities, globally, including the Girl Scouts of Orange County.

**Apriem Advisors***Irvine*

Financial Services

Apriem Cares, helps organizations such as World Vision, Casa Teresa, Big Brothers Big Sisters of OC, Jessie Rees Foundation, and Working Wardrobes via sponsorships, fundraising, volunteer time, and pro-bono work.

**Artemis DNA***Irvine*

Biotechnology

Artemis DNA was founded in 2019 with the goal of making innovative, affordable, and actionable healthcare solutions accessible to all. The Artemis DNA Foundation is a non-profit organization that works to provide free breast cancer screening to women in developing countries.

**B. Braun Medical***Irvine*

Medical & Pharmaceutical Devices

In 2021, B. Braun resumed charitable efforts after COVID restrictions began to ease, by partnering with the American Red Cross, Warrior Foundation Freedom Station, Second Harvest Food Bank and Spark of Love Toy Drive.

**Banc of California***Santa Ana*

Banking

During 2021, the Banc of California team committed 1,400 hours and \$700,000 to supporting BANC Foundation initiatives and contributed \$12,000 to support four organizations' holiday programs.

**Bank of America***Newport Beach*

Finance

Bank of America's employees logged nearly 30,000 hours of virtual volunteer time. Nearly 50 Orange County nonprofits received \$1.9 million in grants, primarily to provide workforce development services and re-skilling that build pathways to employment and sustainable careers.

**BioCorRx Inc.***Anaheim*

Pharmaceutical

Since its inception, BioCorRx has sought to help save and help the lives of individuals suffering from opioid, alcohol use and related disorders. The company's addiction recovery program, Beat Addiction, offers a combination of medically-assisted treatment and proprietary cognitive behavioral therapy through its mobile app.

**Blue C***Costa Mesa*

Advertising/Marketing

Since 1998, Blue C has continuously supported an internal program called Blue C Cares. In 2021 they donated creative services, branding, and video services to charity and non-profits in the amount of over \$70,000.

**Branded Group***Anaheim*

Facility Management

Branded Group team has volunteered nearly 2,000 hours with several non-profit organizations across the country including: The Children's Bureau, Orange County Coastkeeper, The Surfrider Foundation, Orangewood Foundation, Nevada Partnership for Homeless Youth, Second Harvest Food Bank of Orange County.

**Casco Contractors LLC***Irvine*

Construction

Casco Contractors has an annual all company meeting is a team building event in which the team that wins picks the charity for the year. In 2021 their charity of the year is Colette's Children's Home.

**CathWorks***Aliso Viejo*

Medical Device

CathWorks has sponsored the American Heart Association, Octane, Digital Health & AI Movement, Council on Aging, Southern California - Smile Maker Program, University of California, Business School, Big Brothers & Sisters OC, and others.

**Clearinghouse CDFI***Lake Forest*

Finance

As of late November, Clearinghouse CDFI's 2021 donations totalled \$134,247 with over \$65,000 donated in Orange County alone. This includes organizations such as: Girl Scouts of Orange County, Junior Achievement of Southern CA, Boys & Girls Clubs of Tustin, Working Wardrobes, Habitat for Humanity of OC, OCCHC, Santiago Little League, and more.

**CyberForward Academy***San Clemente*

Cybersecurity

Partnered with Orange County United Way Financial Security initiative to provides jobseekers with experience, skills advancement, one-on-one coaching, and other tools that will empower residents to get on the path from surviving to thriving while expanding and elevating cyber security talent.

Where personal and professional meet

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2021 COMPANIES THAT CARE

Disneyland Resort
Anaheim

Tourism/Theme Parks

The Disneyland Resort has a long history of giving back to the community, including a workforce development program, leaders serving on nonprofit boards and support from Disney VolunteARS. During the unique period between October 2019-September 2020, despite the temporary closure of the theme parks and hotels, and subsequent challenges faced during the pandemic, the resort donated \$20 million in cash and in-kind contributions.


Dreamhaven
Irvine

Video Game Development

Dreamhaven partnered with the Children's Hospital of Orange County to help raise funds and awareness for its annual CHOC Walk program. In addition to extending the opportunity to its own employees to support the cause, it also spearheaded the creation of Gamers for CHOC, a brand new initiative that rallied employees, players, and communities from local games-related studios, businesses, organizations, and groups to support CHOC Walk 2021. The effort included fundraising, auction donations, and virtual walks in support of CHOC. The program raised nearly \$200,000.


Ducommun Incorporated
Santa Ana

Aerospace & Defense Manufacturing

The Ducommun Foundation has donated to organizations that help military veterans, children and families of fallen service members, local efforts to end child homelessness and select Pandemic Relief efforts.


Edwards Lifesciences
Irvine

Healthcare/Medical

Since establishing Edwards Foundation in 2004, the company and its foundation have gifted more than \$100 million to nonprofit organizations around the world supporting underserved patients and strengthening communities where employees live and work. Edwards, Providence and Orange County United Way hosted community-based "pop-up" vaccine clinics throughout underserved Orange County neighbors.


Everett Dorey LLP
Irvine

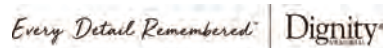
Legal

In addition to initiating the First Responders First program to feed first responders during the pandemic, Everett Dorey supports the Public Law Center, the Veterans Legal Institute, local law enforcement in Costa Mesa and Irvine, the Orange County Lavender Bar Association, the Wounded Warrior Program, the St. Thomas Moore Society of Orange County, the Chapman University Public Interest Law Foundation, the Orange County Bar Association Charitable Fund, the St. Baldrick's Foundation, and others.


Experian
Costa Mesa

Financial Services

In 2021, Experian awarded two OC-based organizations with major grants - the OC Hispanic Chamber of Commerce and TGR Foundation. In total, 120 unique employees volunteered 890 hours to Orange County-based nonprofits and Experian matched \$19,200 to OC-based nonprofits that employees volunteered with and donated to.


Fairhaven Memorial Park and Mortuary
Santa Ana

Deathcare

Participated in SoCal Hospice Foundation - Giving Day Donation/Heavenly Home Project. Senior Care Hero Awards - Lifetime Achievement Recipient Bob Dowson.


Farmers & Merchants Bank
Newport Beach

Financial

In 2021, F&M Bank provided \$2.3 million in sponsorships and donations to more than 650 organizations across Southern California, with Orange County organizations garnering more than 60% of the support. Over 300 Orange County organizations benefitted, whose causes range from fighting food insecurity and providing resources for persons experiencing homelessness, to education, after-school programming, and the arts.


FivePoint Holdings LLC
Irvine

Land Development/Real Estate

FivePoint supported more than 100 nonprofit institutions statewide in 2021 through financial contributions and direct involvement by its associates. The company is collaborating with nonprofits that actively address some of the state's most urgent challenges: job creation, housing insecurity, equity in education, access to healthcare, mitigating climate change, and preserving biodiversity.


Gensler
Newport Beach

Architecture

Firm focuses on communities in four overarching themes: the Next Generation, Housing and Homelessness, Health and Wellness, and the Environment. In Gensler Newport Beach office 75-80% of the office involved in community give back events with the majority focusing on Orange County. (80 people)


Glaukos Charitable Foundation
San Clemente

Medical Device & Pharmaceutical

In 2021, the Glaukos Charitable Foundation was a sponsor at the following events: Truhlsen-Marmor Museum of the Eye, Eyecelerator, Project Vision Hawaii, AAO Foundation, Holland Foundation for Sight Restoration, Beyond Blindness - Vision Beyond Sight Gala, Beyond Blindness Carnival - Sponsored Petting Zoo, Cystic Fibrosis Climb - Kennedy Jacques (Patrick Jacques' daughter), Human Options Fall Luncheon Fundraiser, San Clemente Pierside Preservation Organization, and more.


Global Results Communications
Santa Ana

Public Relations

Mentorship program for college students, as well as the company's booth camps, and PR 360 podcast to help those trying to secure a job in 2021. GRC also has a dedicated focus to helping local sports teams throughout OC, participation in beach clean ups, and more.


Golden State Foods
Irvine

Foodservice Supplier

Focus on Food month initiative launched in May 2021 to inspire another round of food bank grants supporting hunger relief throughout the U.S. 83% of Irvine GSF associates participate in the GSF Foundation.


GritCycle
Newport Beach

Luxury Fitness

Every other month GritCycle conducts a charity ride in conjunction with a post event, fundraising raffle items etc at all three locations where \$5-\$10 per bike booked proceeds are donated to the organization of choice.

COMPANIES THAT CARE | SPOTLIGHTS

Alignment Healthcare- Based in Orange, Alignment offers Medicare Advantage plan options designed to deliver better benefits than traditional Medicare plans at lower costs, and provides a higher level of healthcare for seniors using compassion, technology and experience. Through AVA, the company's artificial intelligence-enabled "command center," Alignment was able to continue identifying members at risk for losing access to food and care as the virus continued to be a threat in the early months of 2021. To ensure their access to food, they partnered with Meals on Wheels Orange County and Mom's Meals to supply thousands of nutritious, diet-specific meals to members so they could remain safe at home.

Beginning March 2021, Alignment Healthcare assisted its members with obtaining access to COVID-19 vaccines through its member engagement channels and, in some cases, its direct clinical resources. Alignment's doctors and clinicians worked with community partners to bring COVID-19 vaccines to as many people as possible, as well as hosting its own vaccination clinics to provide members with more opportunities to safely get their COVID-19 vaccine without exposing themselves to a lot of people at mass vaccination sites.



Banc of California- Through the BANC Foundation, partnerships are forged with local organizations, businesses, entrepreneurs and individuals to facilitate the donation of dollars, time and resources to causes that align with the bank's mission of empowering Californians. Overall, through a continued commitment to bolstering its community, Banc of California has contributed \$12,000 to support four organizations' holiday programs and an additional \$700,000 to other initiatives throughout 2021. Additionally, the highlight of the bank's community involvement is its high employee engagement through hands-on service projects and volunteering. During 2021, the Banc of California team committed 1,400 hours to supporting BANC Foundation initiatives year to date, and will spend additional hours before year end wrapping and distributing toys, baskets and wish-list items to adopted families this holiday season.

The bank's philanthropic efforts are focused on four key areas: financial education, affordable housing, community service and economic growth. A prominent partnership is Banc of California's mentoring program through Big Brothers Big Sisters of Orange County, where bank volunteers meet with high school students and a program specialist to provide exposure to a professional business environment. Since beginning work with the organization in 2019, 15 employees have participated in the program.



Disneyland Resort- The Disneyland Resort has a long history of giving back to the community through various efforts such as cash and in-kind donations to nonprofits throughout Orange County, including Anaheim. These efforts also include a workforce development program, leaders serving on nonprofit boards and support from Disney VolunteARS. During the unique period between October 2019-September 2020, despite the temporary closure of the theme parks and hotels, and subsequent challenges faced during the pandemic, the resort donated \$20 million in cash and in-kind contributions including:

One half million pounds of food to local food banks, including Second Harvest Food Bank of Orange County and the Orange County Food Bank, which celebrated 30 years of support from Disney in 2021. 718,000 pounds of surplus merchandise (toys, clothing, reusable bags) to local nonprofits through the Mickey's Attic program. Recipients included Boys & Girls Club of Greater Anaheim-Cypress, Anaheim Community Foundation, Anaheim Public Library Foundation, Illumination Foundation, & Goodwill of Orange County and more.



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2021 COMPANIES THAT CARE
**Haskell & White***Irvine*

Accounting

The firm supports many nonprofit organizations including UCI Diabetes Center, The Discovery Cube Orange County, Mariposa Women and Family Center, The Priority Center, Laura's House, Wings for Justice, Orange County On Track, Boys and Girls Club of Central Orange Coast, Arts OC, The Laguna Playhouse, Irvine Barclay Theatre, and South Coast Repertory.

**Hilgenfeld Mortuary***Anaheim*

Mortuary

Donates flowers to the churches for special holidays and calendars to the Catholic Churches every year in November. Provides grants to Cypress College for mortuary students.

**Howard's***La Habra*

Appliance, TV & Mattress Retailer

Donating appliances to OC Rescue Mission since 2013 for their transitional housing program for homeless single women and mothers with children, homeless veterans, a shelter home for at-risk teens and alumni housing.

**Hydration Room***Corona Del Mar*

Healthcare

Provided vitamin IV therapies to chronically ill community of Orange County.

**Idea Hall***Costa Mesa*

PR, Marketing, Advertising, Branding

825 total employee hours contributed to company-sponsored external volunteerism. Supports organizations like Feeding America, Project Hope Alliance, Be Well OC, CASA, and others.

**Impact Wealth Management***Irvine*

Wealth Management

As of one of only a handful of Hispanics nationwide that own a wealth management practice with over \$1 billion of client assets, Mark Delp is working hard to change these numbers. Employees have both the resources to give back to their community as well time, they tend to rise to leadership positions. Girl Scouts, Animal Rescue, Spirit League and the Tustin Foundation are just some of the charities Delp's employees have made meaningful impacts with.

**Kaiser Permanente***Anaheim*

Healthcare

Housing for Health: Support of Housing for Health Orange County collaborative, United to End Homelessness, and Illumination Foundation executive participation. Food for Life: Supporting the OC Food Bank, Second Harvest Food Bank, Bracken's Kitchen, Family Assistance Ministries, Meals on Wheels Orange County, AgeWell Senior Center, Pathways of Hope and Abound Food Care to address food insecurity, especially during the pandemic.

**K-CO Products LLC***Irvine*

Home Improvement

Since 2012, K-CO Products has partnered with the Veteran Administration through their Compensated Work Therapy (CWT) Program to help provide income opportunities to Disabled US Veterans. In creating this program, K-CO has been able to help support over 40 disabled US Veterans through consistent seasonal assembly of products in the home improvement industry.

**Leisure Capital Management***Costa Mesa*

Investments

Leisure Capital management volunteered at Second Harvest Food Bank, War Heroes on Water, KidworksOC, Jewish Federation of OC, and more. During Juneteenth they empowered team members to select events and meaningful gifts to black-owned businesses and gave to three local charitable recipients.

**Lynxx Spirits***Huntington Beach*

Alcohol, Spirits

Lynxx Spirits provides their spirits, auction donations, catering services, and percentages of profitability to greater causes. They donate to companies such as LAPD, Working Wardrobes, Modern day high school, Impact giving, and others.

**M S International Inc.***Orange*

Building Materials

In 2021 MSI donated a total of \$752,100 within OC. In Orange County MSI has partnered with Orange Senior Center, donated to Providence - St. Joseph Hospital, Boys & Girls Club, United Cerebral Palsy of Orange County, Pretend City - The Children's Museum, the Anaheim Health Fair, JAINA and Sanatan Temple, Girls Inc., Tustin Public Schools, SAHARA Cares, Orangewood Foundation, and others around the US and globally.

**Mackenzie Corp.***Aliso Viejo*

Customer Insight

MacKenzie Corporation philanthropic partnerships have included the Ronald McDonald House Orange County, Team Kids, Make A Wish, United Way, Girl Scouts of Orange County, Forever Footprints, Extraordinary Lives Foundation, Second Harvest Food Bank, the Bloom Foundation and many more.

**MCDA CCG Inc.***Placentia*

Professional Services-Consulting

MCDA CCG CEO has donated hundreds of hours of free consulting services to multiple companies during the pandemic. Companies that are struggling are receiving free finance and operational consulting services to assist them during these troubling times.

**MemorialCare***Fountain Valley*

Healthcare

As one of Orange County's leading nonprofit health systems they are uniquely positioned to tap their expertise and resources through their various programs and channels to help those in need. MemorialCare staff volunteered more than 8,936 combined hours of their time to administer 115,000 vaccine doses during FY21.

**Montage Laguna Beach***Laguna Beach*

Hospitality & Lodging

2021 Hearts of Montage events and involvement include four beach cleanups, two Red Cross Blood Drives, socks 4 Heroes Military support, Home-Front America, winter clothing drive, Laguna Beach Friendship Shelter, Make-A-Wish, Leukemia & Lymphoma, Forever Footprints, and Pacific Marine Mammal Center.

COMPANIES THAT CARE | SPOTLIGHTS

Ducommun Incorporated- The Ducommun Foundation supports the Orange County United Way's "United to End Homelessness" initiative. This effort represents a powerful collaboration between Orange County's top business, philanthropic, governmental, faith-based and nonprofit leaders, all working to create long-term supportive housing for those most in need. The Ducommun Foundation supports Orange County United Way's effort to end child homelessness by 2024 and significantly reduce homelessness countywide.

The foundation supports many organizations for military veterans, children and families, including Hire Heroes USA, the Children of Fallen Patriots Foundation, the Yellow Ribbon Fund, and Wounded Warriors Family Support. As a leader in the Aerospace and Defense industry, Ducommun continues to support community-based Science, Technology, Engineering and Math (STEM) programs and initiatives that nurture and develop the next generation of innovators, thinkers and technicians.

Farmers & Merchants Bank- Farmers & Merchants Bank has been supporting local communities in Orange County for over 65 years. If you have been to a nonprofit fundraiser, Pacific Symphony Family Musical Mornings concert, Angels baseball game, local Rotary meeting, Chamber event or even a little league game, you have probably seen F&M Bank's logo somewhere. The bank supports organizations through charitable contributions, sponsorships, access to grant programs, and through employee involvement.

The Farmers & Merchants Bank Foundation, a corporate 501(c)(3) foundation, distributed \$291,581 in 2021 to 69 deserving recipients, 30 of which are OC-based. Education was the area of focus for 2021 and grants were given in the following areas of impact (OC recipients noted): all levels of schooling (elementary through university), organizations that support hands-on nature education (Environmental Nature Center), innovative math programming (MIND Research), science programming (The Discovery Cube), reading programs (CHOC Reach-Out-and-Read), and after school support programs (Higher Ground Youth & Family Services, and Boys & Girls Club of South Coast Area).

MemorialCare- MemorialCare staff volunteered more than 8,936 combined hours of their time to administer 115,000 vaccine doses during FY21. They moved quickly to partner with local organizations and city governments to proactively seek out the most vulnerable of their communities. MemorialCare sought out seniors and health compromised individuals in their homes, in pop-up clinics, in elderly living facilities, and at hospitals.

Understanding the pandemic's impact on mental health, MemorialCare also began offering online mental health resources free of charge to the entire Southern California community of nearly 23 million residents at the height of the pandemic surge in early 2021. MemorialCare's education programs and health screenings continued all year through in-house programming and via community grants to fund local outreach. All in all, they donated over \$4.7 million throughout Orange County. Some of the organizations that they partnered with include: The Vietnamese American Cancer Foundation, Meals on Wheels OC Senior Nutrition Program, City of Fountain Valley's Senior Center Mobility Program, Age Well Senior Services, and more.



Ducommun Incorporated

Supporting the Communities Where We Live & Work

Ducommun is a global leader in the design, engineering and manufacturing of complex electronic systems, structural solutions, engineered products and aftermarket services for the Aerospace and Defense industry. Through The Ducommun Foundation, we proudly support the United Way of Orange County's efforts to end child homelessness, Pandemic Relief, STEM on the Sidelines™ education initiatives, Ducommun Scholars, and local charities that help our military veterans and families including Yellow Ribbon Fund, Wounded Warriors Family Support, Hire Heroes USA and Children of Fallen Patriots. **#DucommunCares**

Ducommun.com



2021 COMPANIES THAT CARE

Morinaga America Inc. *Irvine*
Confectionery

Morinaga America, Inc. has donated product for high schools, local community events, churches, etc. for several years. This year they are providing monetary donations to the Irvine Police and Fire departments, and a \$50,000 donation to Skyview and HERO for Kids Foundation in Orange, CA.


OEM Materials & Supplies Inc. *Santa Ana*
Packaging & Shipping Materials/ Medical Supplies

OEM Materials & Supplies supported Olive Crest throughout the year with donations In-kind. Donations included: Foster Moms Mother's Day Care Packages & Gift Cards, and Launch Back Pack Care Packages with Gift Cards to Assist Children that Turn 18 and Transition Out of the Foster Care Program.


Pacific Dental Services *Irvine*
Healthcare/Dental

Pacific Dental Services provides several opportunities for clinicians to provide donated dentistry and empower them to offer pro-bono services to patients in need. This includes Smile Generation Serve Day, an annual day of service. In 2021 they celebrated the 12th Annual Smile Generation Serve Day. To date, over \$85,000 in donated dentistry has been donated to patients throughout Orange County.


Pacific Life
Newport Beach
Financial Services

In 2021, Pacific Life and the Pacific Life Foundation plan to donate more than \$7.25 million to over 465 organizations, including \$3.8 million to 238 Orange County nonprofits, with additional corporate donations and in-kind contributions still to be determined.


Pinner Construction
Anaheim
Construction

In this past year alone, Pinner has made donations to the following individuals, scholarship funds and organizations: CHOC Children's Hospital of Orange County, Women's Transitional Living Center, Anaheim Union High School District Associated Student Body, International Society for Children with Cancer, Miracles for Kids "Holiday Basket of Miracles" Program, and others.


Primary Freight Services *Buena Park*
Integrated Shipping Service Provider

For the past 14 years Primary Freight Services have participated in "Adopt-A-Family" holiday program run by the Salvation Army. They also help to prepare & serve food to the homeless at the Long Beach Mission Outreach and run a blanket drive to donate to the shelters.


Providence Southern California *Irvine*
Healthcare

Providence contributes to innovative programs to help the poor, the suffering, those who are homeless, mentally ill, unable to pay for health-care, immigrants, school children and other vulnerable populations. They do this often through work with community partners, expanding their expertise to truly make a difference. In 2020, Providence Orange County contributed \$260 million in programs, services and healthcare for the uninsured and under-insured.


PwC
Irvine
Professional Services

The PwC Charitable Foundation, Inc. has long been a leader supporting the people of PwC in times of need and investing in emerging and scalable solutions to help meet society's greatest challenges in education and humanitarianism. To date, the Foundation has invested more than \$140M to address these urgent issues. In FY21 the Foundation made commitments totaling over \$15 million to support COVID-19 relief, disaster recovery, the people of PwC, social justice reform and continued efforts to drive equity at scale.


R.D. Olson Construction *Irvine*
Construction

R.D. Olson continues to partner with Olive Crest by donating Easter baskets for their group homes, backpacks for the Back-to-School drive, and this year raised approx. \$80,000 for Olive Crest through their annual golf tournament.


Revolution Cantina
Fullerton
Restaurant

Over the years, Revolution restaurants and employees have contributed countless meals, funding, and volunteer hours in Fullerton, including Fullerton Fire, Fullerton Police, Cal State Fullerton, Fullerton Chamber of Commerce, Women's Transitional Living Center. Working together with community partners, Revolution takes pride in their efforts to enrich and support the community while carrying out tradition of providing the rich, delicious flavors of Mexico.


Rosendin
Anaheim
Construction- Electrical Contracting

Rosendin builds large-scale, high technology commercial projects in hospitality, transportation, and renewable energy sectors that benefit the communities where their employees live and work. Through the Rosendin Foundation, the company's 501(c)(3), employees also support monthly donations to local nonprofits, and collect food for Second Harvest Food Bank of Orange County and household goods to Laura's House to benefit domestic violence survivors. Since the Foundation began in 2020, in its philanthropic mission, the Foundation has donated \$50,000 to Orange County community organizations that focus on supporting health including emotional, nutritional, and occupational programs.


RSM US LLP
Irvine
Audit, Tax & Consulting

The RSM US Foundation is focused on supporting its current programs, including Dollars for Doers, RSM's Birdies Fore Love, RSM's University Giving Match programs and RSM Volunteer Week.


Saint Verena Hospice Care Inc. *Brea*
Hospice Care

Sponsored Fullerton Union High School Speech Club, donated money to support Catholic Church foundation to help COVID-19 food bank and charities. Provided the free hospice service for the low income family elderly.


SeneGence
Foothill Ranch
Cosmetics

The Make Sense Foundation, regularly raises and contributes funds for women and children in need as part of the plan to give back to the global community. Facilities and organizations receiving recent donations have included Ronald McDonald House, Intermountain Medical, Tampa General Hospital, Oak Hill Hospital, CUMC Bergen Mercy, Kearney Regional, St. Rose Dominican Hospital, Family Crisis Center, Allegheny Health Network, St. Joseph Hospital, Mercy Regional Medical Center, Los Angeles Police Department, OK Kids Korral, and many others.

COMPANIES THAT CARE | SPOTLIGHTS

RSM US LLP- In 2014, RSM established the RSM US Foundation as part of their giving strategy and to support the firm's stewardship values. A tax-exempt public charity, their foundation is dedicated to building tomorrow's middle market leaders by: enhancing educational outcomes through programs for individuals to have a career path to become an entrepreneur or middle market business leader, and/or supporting organizations committed to providing a more stable environment for youth in the areas of hunger, housing or health, which help them succeed in education.

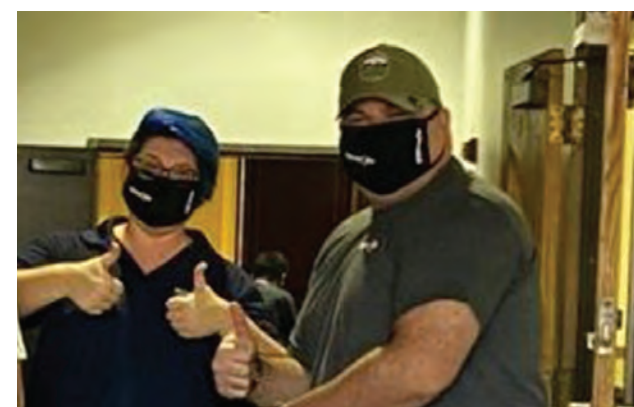
RSM provided a check for more than \$4.8 million to the Davis Love Foundation to support charities focused on children and families across the U.S. and in Canada. The funds were raised through RSM's employee-led Birdies Fore Love campaign and its on-course birdies competition with the PGA TOUR in connection with the 12 annual RSM Classic, a PGA TOUR event that takes place at Sea Island, Georgia each fall. Through Birdies Fore Love, RSM's people in the U.S. and in Canada, supported with a matching donation from the RSM US Foundation, raise funds to support the foundation's mission to build tomorrow's middle market leaders through charitable donations focused on enhancing educational outcomes and the quality of life for children and families.

Snell & Wilmer- Throughout the year, Snell & Wilmer has engaged in over 300 pro bono matters, contributing to over 25,000 hours worked, that directly affect minority individuals and communities and provided over two dozen initiatives and CLE's that offered diversity-focused professional development and/or a better understanding of diversity in the legal profession.

The Snell & Wilmer Charitable Foundation was established in 2002 in order to have a positive and direct impact on the lives of children in the communities they serve by supporting and enhancing their early education. They do this through three-year monetary grants to various carefully selected nonprofits. The Foundation grants approximately \$200,000 annually to organizations throughout their geographic footprint.

Thermal-Vac Technology Inc.- Supplying customers like NASA and Aerojet Rocketdyne with aerospace and defense services, Thermal-Vac Technology has been the premier brazing, heat-treating, and finishing facility in Orange County for over 35 years. This family owned and operated company believes that everyone deserves a second chance, and that everyone's story matters. Long committed to supporting their own community, over three years ago, TVT was excited to be introduced to Chrysalis, a nonprofit that changes lives through jobs by helping people experiencing homelessness, poverty, and the criminal justice system overcome barriers to employment.

When in search of team members Chrysalis is TVT's first choice for a qualified workforce. By hiring Chrysalis clients, TVT changes lives, gives people hope, builds their self-confidence, and helps them get on the pathway to self-sufficiency. Over 30% of the TVT team has life experience in addiction, poverty, homelessness, or the criminal justice system. These experiences create a diverse and inclusive environment that has made Thermal-Vac one of the industry leaders. Poverty, homelessness, and unemployment are very real and growing crises in Orange County. What is unique, however, is an employer who sees beyond someone's past, believes in the potential of each person, and treats them with dignity, honor, and respect. TVT embodies each of those qualities and walks alongside every one of their employees, helping them heal from past trauma and find not only an employer who believes in them but a family.



2022 Charity Event Guide

First Calendar Listing Free!

Reservation deadline extended until
DECEMBER 17, 2021

Charity Event Guide is the annual resource highlighting the top five charity events of 2021 (by net revenue in six categories), plus a look ahead to the Orange County charity events planned for 2022.

- 2022 calendar & descriptions of OC charitable events by month PLUS calendar access on www.ocbj.com with link to your website
- Showcases the top five fundraising dinner/galas, luncheons, breakfasts, golf events, walk/runs and unique virtual campaigns from 2021
- Reach a philanthropic group of affluent and influential leaders in OC - average household income of \$748,000 (6x the county average)



Publication Date:
January 24, 2022

Ad/Listing Reservation: December 17, 2021

Ad Materials Due: January 10, 2022

For more information, contact Amy Sfreddo at 949-664-5058 or sfreddo@ocbj.com.

2021 COMPANIES THAT CARE
**SetSchedule***Irvine*

Tech, Real Estate

Over half of SetSchedule's employees, both in Orange County and remote, participated in a Cardz for Kidz event which in addition to providing greeting cards for children in hospitals, also raised money to provide backpacks and school supplies for underprivileged children in Orange County. Armed with this passion for helping other businesses stay afloat during the pandemic, SetSchedule established a vendor advancement program, inviting small businesses and other companies to apply. SetSchedule would pay for the services upfront to give the business money to stay open, and services could be rendered to SetSchedule in the next two years.

**Seven Gables Real Estate***Tustin*

Real Estate

In 2021 Seven Gables nationally recognized Marketing department provided annual reports, stationary, as well as free print production to the Make-A-Wish Foundation, and many of agents personally volunteer to the foundation. Other activities include a Holiday Food Drive, New Year's Diaper Drive, and next year 12 months of Giving where they will host a new philanthropy/cause each month that will benefit people throughout all of Orange County.

**Slick Marketers***Rancho Santa Margarita*

Marketing

Every year, Slick Marketers makes an effort to reach out to the OC Rescue Mission and spearhead an office-wide food drive collection. They reach out to over 500 other offices to involve them in this process. The company also contribute yearly to the local Toys for Tots toy drive around the holidays. Most recently, and most notably, their team traveled to a conference in Colorado and held a \$10,000 charity giveaway to all patrons who visited their booth. The Orange County charities included International Society for Children With Cancer, located in Irvine, the Wyland Foundation, in Rancho Santa Margarita, and Laura's House in Irvine.

**Snell & Wilmer***Costa Mesa*

Law Firm

Many attorneys in the Orange County Snell & Wilmer office hold a firm-supported leadership position in a community or professional organization and the time spent on pro bono work is credited toward annual performance goals and therefore it is considered for purposes of evaluation and compensation. Over the next five years, the firm expects to provide more than \$25 million of pro bono legal services. All attorneys and paralegals are encouraged to commit a minimum of 50 hours per year to some type of pro bono activity.

**Sonendo***Laguna Hills*

Medical Technology

Sonendo supports two primary organizations, Human Options and the Orange County Ronald McDonald House Charity. In addition to providing financial support they spend time with the organizations by participating on key committees or their Board.

**Sunday Brunch Agency***Huntington*

Marketing & PR

Sunday Brunch Agency has contributed to a wide variety of philanthropic organizations and causes. Some of these include Working Wardrobes, American Heart Association, women's transitional living center, impact giving, AND SBDC.

**Sweet James LLP***Newport Beach*

Personal Injury Attorneys

In 2015, Sweet James Partner Steve Mehr volunteered with his young son, Cam, as one of the mentors for the annual OC Children's Business Fair where the homeless children in their programs have the opportunity to gain entrepreneurial skills starting at a young age. Inspired by Steve's passion for helping homeless families and individuals transition into financial self-sufficiency, Founding Partner "Sweet" James Bergener challenged their firm to sponsor 20 meals for homeless men, women, families, and veterans for every case they closed.

**Swinerton***Santa Ana*

Construction

Through the partnership with The Swinerton Foundation, Swinerton gives over \$1.5 million annually to local charities across the United States. Of that, 5% stays in Orange County-supporting organizations such as The Salvation Army, Orange County School of the Arts, Surfrider Foundation, and Waymakers.

**Synoptek***Irvine*

Technology Consulting

Synoptek Gives initiative, an ongoing, company-wide program that is committed to social responsibility, compassion, and volunteerism. Together, Synoptek employees logged in over 940 hours of volunteering, with nearly \$10,000 dollars raised in Orange County towards OC United Way and 16 other agency beneficiaries within the community.

**Tangram Interiors***Newport Beach*

Interior Office Workspaces

Tangram Interiors kept their commitment to supporting the Orange County Rescue Mission throughout the pandemic by providing them with 61 new children's Node Desks, workstations, task seating, and meeting spaces for the homeless children, administrative staff and case managers. In addition to their support for Orange County Rescue Mission, Tangram Interiors supports several other Orange County nonprofits, including the Orangewood Foundation.

**Technologent***Irvine*

Technology

Technologent supports philanthropies such as Girl Scouts of America and Girls who Code for many years. They also support philanthropies such as A Mighty Change of Heart, the Covenant House, and Willow International.

**Teradek/Creative Solutions***Irvine*

Technology

Creative Solutions/Teradek collaborated and supported Made in Her Image this year, a program dedicated to the advancement of young women, girls, and non-binary youth of color within film, media, and technology.

**The Facial Lounge***Corona Del Mar*

Vegan Skincare and Spa

The Facial Lounge organizes beach clean up days and has even helped to start the Women's Wellness day with the Susan Samulie Center for Integrative Medicine! Other involvement includes Make A Wish Foundation, Miracle for Kids, Orange County Sports Foundation, Girls Inc. and Share Our Selves (SOS).

THANK YOU

2021 Orange County Business Journal Companies That Care Honoree



To our leaders for inspiring us with innovation and serving hearts. To our team for providing around-the-clock access to personalized services and care programs.

Most of all, to our members for trusting us to provide them with the highest quality care and coverage when and where they need it.

We care. Because of you.



We put the seniors we serve at the center of everything we do.

At the heart of every touchpoint is a sense of compassionate responsibility that echoes through our entire corporate culture and into the communities we serve.



Alignment Healthcare

COMPANIES
THAT CARE



ALIGNMENTHEALTHCARE.COM

2021 COMPANIES THAT CARE



The Habit Burger Grill

Irvine

Restaurants

The Habit Burger Grill, through its foundation and social purpose council, has supported the local community by connecting people in need to real food, enabling learning & development, and inspiring economic growth. Throughout 2021, Habit food trucks have donated over 2,500 meals to underserved community members, healthcare personnel, and first responders via the Anaheim Convention Center, Illumination Foundation, Costa Mesa Police Department, and Tee It Up for the Troops.



The Maids of Orange County

Tustin

Cleaning Service

The Maids of Orange County provides free home cleanings to individuals fighting cancer through Cleaning For A Reason program, donates in various ways to the Spark of Love Toy Drive, HomeAid Orange County Essentials Diaper Drive and Thanksgiving Meal Drive, and in other various ways.



The Prince Organization

Yorba Linda

Hospitality

CEO of the hospitality group's Prince Organization, Sunil Tolani, donated about \$300,000 to help people struggling in India during the surge of COVID cases. Tolani has also utilized his leadership position as a hotelier to prevent domestic abuse cases and instances of sex trafficking involving women since founding Prince Organization in 2007.



Thermal-Vac Technology Inc.

Orange

Heat treating, brazing, chemical processing, specialty coatings

Over three years ago, TVT was excited to be introduced to Chrysalis, a nonprofit that changes lives through jobs by helping people experiencing homelessness, poverty, and the criminal justice system overcome barriers to employment.



U.S. Immigration Law Group

Santa Ana

Legal

Provided free education presentations via zoom webinars and facebook lives so that the community could continue to have access to the most up to date information especially as many experienced a high level of stress and anxiety with the travel restrictions and consulate closures. The firm also supports nonprofit community partners such as the Public Law Center, Catholic Charities, World Relief and the Orange County Justice Fund through technical support, training and service.



UBS Financial Services

Newport Beach

Finance/Wealth Management

Seasonally UBS participates in food and clothing drives, throughout the year they participate in Cards for Hospitalized Kids - getting employees and their families involved in making a positive impact in the lives of sick children, creating literacy and hygiene kits for the Mental Health Association of OC and various other outreach programs.



US Alliance Group

Rancho Santa Margarita

Payment Processing

USAG's CEO, Fadi Cheikha, and his wife Kim Cheikha, founded Aiden Whisper, a nonprofit charity that helps support a number of organizations where 100-percent of donations go directly to the organizations themselves. USAG employees are awarded "ETO" days where they are encouraged to donate their time to Aiden Whisper, other charities, community events, or self-improvement.



Viewsonic Corporation

Brea

Display Solutions

Under the "Empowering Future Generations" initiative, ViewSonic continues to donate to local schools, clubs, after school programs and universities. The Empowering Future Generations initiative was designed to identify and support schools and organizations in need of technology resources for STEM, STEAM, interactive classrooms, robotic workshops and esports clubs.



Vivera Pharmaceuticals

Newport Beach

Pharma

Vivera provides no-cost testing to numerous organizations in Orange County, which includes the Coast Community College District. Through their nonprofit organization, Vivera Cares, they are helping underserved communities, such as Tribal Nations and frontline workers, access the resources they need to keep their communities safe and healthy.



Wahoo's Fish Taco

Tustin

Food Services

What began as a small act of kindness-a single delivery of 300 meals from Wahoo's Fish Taco to Hoag Hospital in Irvine, CA - turned into an astounding sea of collaboration of over 40 partnering businesses and hundreds of supporters and volunteers, resulting in over 23,000 meals, treats, beverages and PPE to frontline heroes and those in need during the Coronavirus pandemic.



Wells Fargo

Irvine

Finance

Wells Fargo is committed to building an inclusive, sustainable recovery for all through a focus on opening pathways to economic advancement, championing safe, affordable homes, empowering small businesses to thrive, and enabling a just, low-carbon economy.



Windes

Irvine

Accounting & Advisory Services

Windes is proud to support many Orange County (OC) organizations that improve the quality of life for others. There are two organizations that Windes employees have supported consecutively for five and 15 years, respectively including, Cystic Fibrosis (CF) Foundation's largest Orange County events, Great Strides, and UCI's Center for Investment and Wealth Management (CIWM). One of the goals of CIWM is to provide financial education for individuals across all socioeconomic backgrounds.



Wright Ford Young

Irvine

Accounting

One way Wright Ford Young & Co. gives back to the community is through their Charitable Giving Program which was started in 2007. WFY donates one percent of gross revenue each year to many local nonprofits. So far, they've donated over \$1,388,000 to many charities.

Xperience Restaurant Group

Cypress

Hospitality-Restaurant

Taco 'Bout Kindness Program is composed of corporate and community leaders that continuously meet to seek out ways to show care by proudly serving thousands of meals annually to groups and individuals in their times of need and crisis. During the pandemic many students were left without access to hot meals that were previously provided by the public school system. In response, El Torito provided over 25,000 free kid's meals to children without access to daily lunches.

Thanking Our Orange County Nonprofit Community, and Supporting Local Businesses

As we look toward the holiday season and the hope it brings for the future, I am grateful to the many nonprofits who have cared for our community during the incredible challenges of the past two years.

As an essential industry, it was vital for Wells Fargo to continue providing financial services across the Orange County and to support critical relief for our county's most vulnerable communities. From providing families with rental assistance, to helping our small businesses continue their operations, to offering meals for our communities, our nonprofits have been at the heart of the region's pandemic relief and recovery efforts.

Wells Fargo has honored the work and mission of local nonprofits by donating more than \$2 million to bolster COVID-19 relief efforts in Orange County since 2020.

Small businesses are an important driving force in job creation and thriving communities. Wells Fargo continues to intensify its efforts to provide entrepreneurs with technical assistance and increased access to affordable sources of capital and training so they can grow, build assets, and create local jobs. Examples of Wells Fargo's commitment to supporting the small business community include our support of Orange County Inland Empire Small Business Development Center (OCIE SBDC) that provides support to small

**WELLS
FARGO**



business owners and in the past year has provided support to more than 10,000 local entrepreneurs.

This year, Wells Fargo has launched HOPE USA, a program to help strengthen small businesses during this crucial holiday shopping season. Through this effort, the bank is working with nonprofits to help beautify and promote business districts in more than a dozen cities across the country and encourage everyone to join in giving hope a hand by shopping locally.

In Orange County, we are excited to come together with the City of Garden Grove, the California Asian American Chamber of Commerce, SteelCraft and OCIE SBDC as we ring in the holidays with our outdoor Holiday Hope Bazaar on Saturday, Dec. 18 at Steel Craft in Garden Grove where you can shop at over a dozen local merchants, enjoy local food, drinks, and family-friendly entertainment. I hope to see you there.

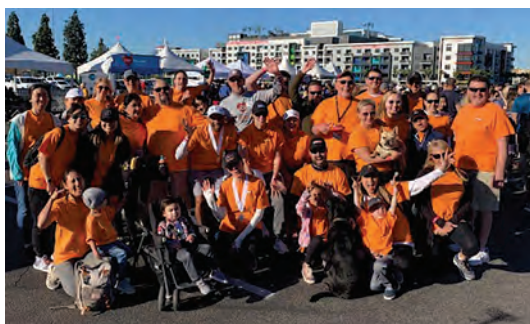
Small businesses are the heartbeat of our communities. They pump life into our neighborhoods, making them vibrant places to live and work and raise families. We can all play an important role in driving our economic recovery, and we encourage everyone to join in giving hope a hand and patronize our local small businesses.

News, insights and perspectives from Wells Fargo are also available at stories.wf.com. Keith Kobata is Orange County Region Bank President with Wells Fargo Bank.



McCarthy Building Companies Donates Over Quarter Million Dollars to Further Orange County Community Efforts

For McCarthy Building Companies, Inc. building stronger communities goes beyond constructing spaces where people live and work. The teams at McCarthy are passionate about building neighborhoods and improving lives by helping those in need – being a good neighbor is part of the company's DNA. Driven by its Heart Hats program, which was established in 2005, McCarthy has raised and donated millions to its communities.



The people at McCarthy are often characterized by their willingness to go above and beyond, and that passion extends to helping individuals and communities near its jobsites and offices.

Having established its Southern California presence over 40 years ago, the general contractor has been a longstanding partner of the Orange County community for decades, and its Newport Beach office is made up of locally-based employee-owners, who are dedicated to supporting fellow neighbors through building structures that positively impact the community – including Children's Hospital of Orange County (CHOC) New Patient Tower, Westminster Police Department Building, Soka University of America New Science Building & Housing, John Wayne Airport Terminal C, and St. Jude Medical Center Northwest Tower & Central Plant. Beyond the work the teams on these projects have been hired to complete, McCarthy's employees give generously their time and skills to build homes with Habitat for Humanity, playgrounds and school enhancements, ramps to make homes more accessible and so much more. In the last year alone, its teams have supported the UCI Anti-Cancer Challenge, CHOC Children's Big Brothers Big Sisters, March of Dimes, American Heart Association, Boys & Girls Club, ACE Mentor Program, MS Society of Orange County, and many other causes that are important to the people of Orange County.

In 2022, the general contractor already has many plans to further amplify its community outreach efforts within the Orange County area. McCarthy's in-office and project teams look forward to having a positive impact on Orange County for years to come.



Laying the Foundation for a Brighter Future

Being a good neighbor is part of our DNA at McCarthy, using our time and skills to build structures that positively impact our community.

Los Angeles | Newport Beach | San Diego
mccarthy.com | License No. 411173

McCarthy

EDWARDS
LIFESCIENCES
FOUNDATION



Edwards

What Makes Our Hearts Beat

Over the past two years, we have continued to listen to and partner with charitable organizations, communities and our employees to understand how we can best use the power of giving to help those in need, as we know COVID-19 has impacted our patients and neighbors, particularly the underserved, in ways that we could never have imagined.

Through it all, our mission and focus remains the same: to positively impact patients and strengthen communities. With social distancing requirements and travel restrictions making many charitable programs challenging to execute, we have been energized by the new ways our charitable partners continuously support those in need. Clinicians have found innovative ways to guide healthcare workers as they treat patients; clinical education forums have shifted to hybrid learning platforms; social distanced workstations have allowed homeless youth to plug into and continue their virtual education.

In 2014, we launched Every Heartbeat Matters (EHM), our centerpiece of our global giving, and by 2020, our community of charitable partners impacted over 1.7 million underserved people, surpassing the initial goal of 1M. **Now, we are working towards an additional EHM goal: we will improve the lives of 2.5 million more underserved structural heart and critical care patients by the end of 2025.** We are grateful for the passion and commitment of our charitable partners as we grow EHM to support even more underserved patients with the greatest need. Right now, that need and barriers to care are more distinct than ever with many programs halted for COVID-19.

We are proud that as this initiative expands, so have our opportunities to support humanitarian clinicians, educators and underserved patients worldwide. In partnership with MAP International, we have enhanced our product donation program, increasing access to donated Edwards' technologies for underserved structural heart and critical care patients outside the U.S.

Supporting our communities and patients within them continues to be what makes our hearts beat, with purpose.

One in 2.5 Million - Every Heartbeat Matters:

Hammed, a 39-year-old from Lagos, had a heart

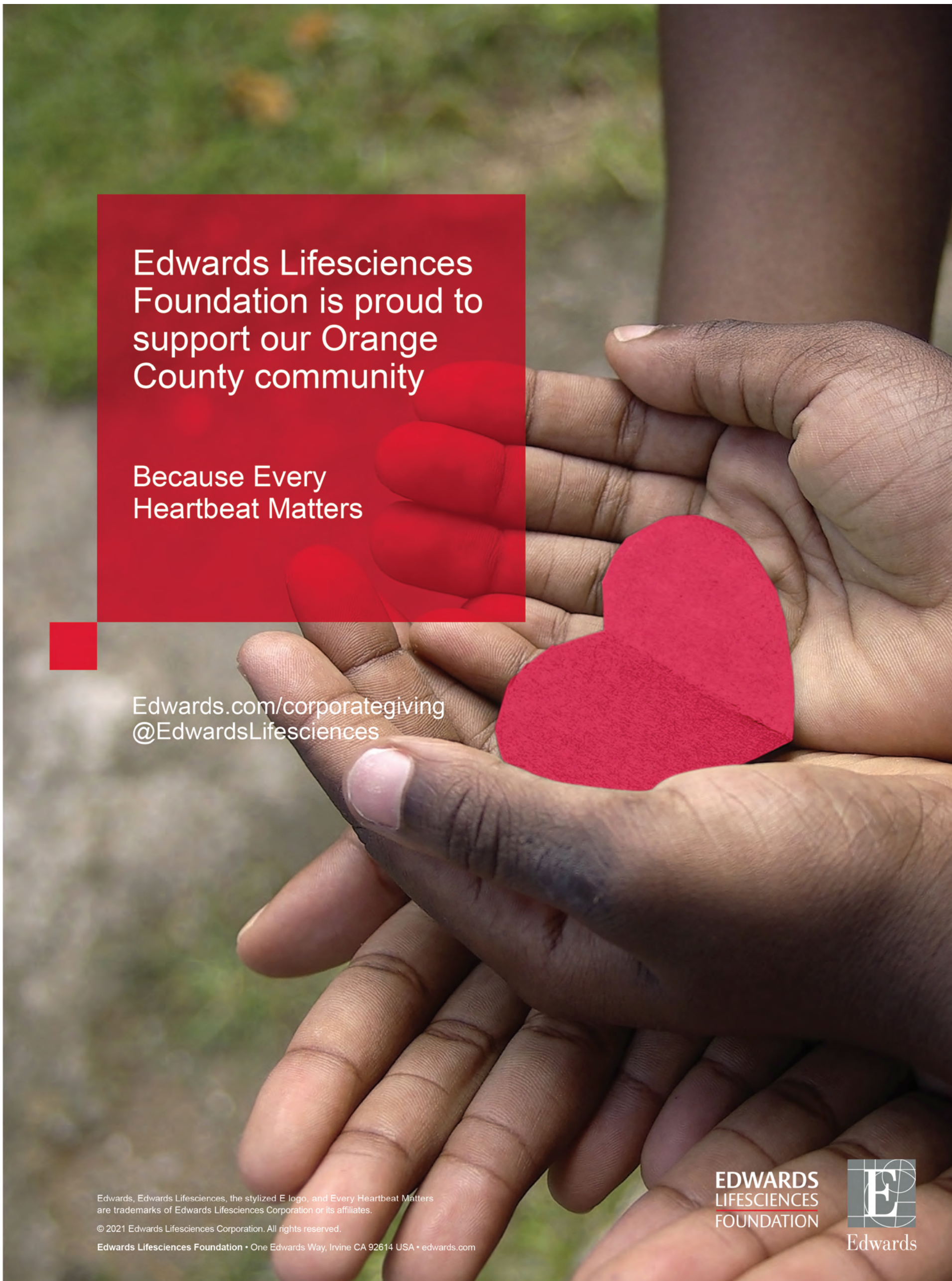
condition that deteriorated over time, leading to difficulty performing his job, which is essential to his family. Heart surgeons on a humanitarian medical mission supported by Every Heartbeat Matters partner Thoracic Surgery Foundation, were connected to Hammed. While training and supporting local Lagos surgeons, these visiting surgeons were able to perform a heart valve replacement in September of 2021. After a few days in the ICU and receiving follow-up care, Hammed fully recovered. He and his family were fully supported financially during this time, so he did not have to make the decision of taking care of his health versus supporting his family.



Hammed, 39-year-old heart valve replacement patient, surrounded by the medical team following his treatment, on his road to recovery.

About Edwards Lifesciences: Edwards Lifesciences is the global leader of patient-focused innovations for structural heart disease and critical care monitoring. We are driven by a passion for patients, dedicated to improving and enhancing lives through partnerships with clinicians and stakeholders across the global healthcare landscape. Edwards' commitment to charitable giving and participation in philanthropic causes is one of the defining elements of our culture. Since 2004, the company and Edwards Lifesciences Foundation have gifted more than \$100 million to charitable organizations around the world supporting underserved patients and strengthening communities where our employees live and work. Support for these causes includes foundation grants, donations of Edwards technologies for humanitarian patient care, and pursuit of 100% of employees involved in charitable activities each year. We invite you to learn more at [Edwards.com](https://www.edwards.com).

2.5 Million More by 2025
Detect. Treat. Recover.
EveryHeartbeatMatters.org



Edwards Lifesciences
Foundation is proud to
support our Orange
County community

Because Every
Heartbeat Matters

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EDWARDS
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Edwards

Rich Habits, How Many of These Do You Have?

Picture personal finance as a game of chess. We are all forced to play the game, and the problem is most people only know how to move the pawns! Only when you have all of the pieces working in unison do you have a powerful, winning strategy. Our habits move our pieces on the board, so let's spend some time going over some winning moves for our lives.

*This article uses parameters and statistics from Tom Corley's book "Rich Habits". Corley defines a wealthy person as having \$3.2 million in net liquid assets, and a struggling person has \$5,000 or less in liquid assets. Obviously financial success is not the only way to measure a person's success, but it is a way to measure in a way that everyone can relate to.

1) Learn every day

- 88% of wealthy people read 30 minutes or more every day
- 63% of wealthy people listen to audiobooks instead of music in their car
- Only 11% of wealthy people read purely for entertainment purposes
- Only 1 in 50 of those struggling financially engage in learning every day

What you read, watch, and think throughout the day is what you are feeding your mind. Successful people choose to consume information that propels them forward, just like a healthy person usually chooses an apple over a snickers bar.

2) Limit your junk consumption

- 66% of wealthy people watch less than an hour of entertainment-based TV
- 63% of wealthy people spend less than an hour a day using the internet for entertainment
- 77% of those struggling financially spend more than an hour on both of these things daily

We live in a world where boredom can be cured with a few simple swipes of our fingers, or the press of a button. It's so easy to fall into a deep-rooted habit of mindlessly surfing social media, or immediately turning on the TV after a day of work. Successful people will limit this habit and use this time to pursue their goals and get even further ahead in life.

3) Even-keeled demeanor

- 94% of wealthy people filter their emotions
- 79% of those struggling do not filter their emotions

Letting your emotions get the best of you has a powerful negative compound effect on your life. It can destroy relationships both at work and at home or cause you to be too fearful to go after a goal. Successful people think before they speak. Remaining calm and looking at situations objectively will positively compound into incredible opportunities over time.

4) A goal without a plan is just a wish

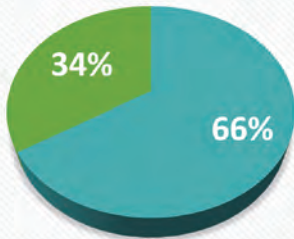
- 70% of wealthy people constantly pursue at least one major goal
- Only 3% of people who are struggling financially do this

Unfortunately, most people go through life wishing they could do that, go there, or be like that person. It takes a disciplined approach to turn those wishes into tangible goals that can be achieved. Take the time to actually write down your goals and make a game plan to get them done!

5) Find a mentor

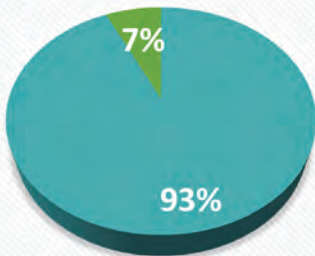
- 93% of wealthy people attribute their success to influence from mentors

Wealthy Individuals and Entertainment-Based TV



- Watch less than an hour of entertainment-based TV daily
- Watch more than an hour of entertainment-based TV daily

Success Attributed to Mentors



- Wealthy people who attribute their success to influence from mentors
- Wealthy people who do not attribute their success to influence from mentors

Once you have outlined your goals, find someone who has already achieved them. You will be surprised how willing successful people are to pour into others. It is up to you to take initiative. This is a very efficient way for you to bypass other people's failures, and not have to reinvent the wheel.

Studies have shown that it takes the average person 66 days before a new behavior becomes automatic. If you find that you're not where you want to be in life, examine your habits and get started! After all, it is the small things repeated every day that separate the successful from the unsuccessful.



Christopher Whitaker, CFP®, AIF®

Financial Advisor
Apriem Advisors
(949) 253-8888

Christopher has extensive experience in working with high net worth clients and their families. He is both a Certified Financial Planner and Accredited Investment Fiduciary, obtaining his bachelor's degree from Point Loma University in San Diego California, and advanced credentials from Boston Institute of Finance. Christopher leads the firm's financial planning department by providing in-depth cashflow analysis, strategic tax planning, and guides the team in each of the 8 financial planning domains to bring exceptional planning services to clients. He has hosted several webinars where he takes complex financial topics and breaks them down into easy-to-understand concepts for viewers.

Apriem Advisors

Apriem Advisors is an independent, registered investment advisor firm based in Southern California, serving hundreds of families all over the United States. True to our Latin-based namesake, we strive to provide our clients with the highest degree of service while handling all facets of their finances, helping them reach the goal of financial security with peace of mind.

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RIA SURVEY
& RANKING
2021

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WHO WE SERVE

We are experts in multi-generational family wealth management.

PERSONALIZED FINANCIAL PLANNING • GOALS-BASED INVESTMENT MANAGEMENT
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ESTATE PLANNING • LEGACY PLANNING • EDUCATION PLANNING
INSURANCE ANALYSIS • SPECIAL NEEDS / ELDER CARE PLANNING
SMALL BUSINESS PLANNING

SPECIALTY SERVICES

WOMEN OF WISDOM

Women of Wisdom (WOW) focuses on the unique financial needs of women. Along with our specialized financial planning and investment management, we offer monthly educational events that aim to encourage, empower and educate women. We are best equipped to support:

- Widows
- Divorcees

CHARITABLE SERVICES

Apriem Charitable serves as your partner in philanthropy. Our charitable clients desire a life of significance beyond success. Whether through the creation of an endowment account or designing a specific giving plan, we encourage generous giving by serving two specific clientele:

- Endowments
- Charitable Families

INDUSTRIAL SERVICES

Industrial Services answers your retirement questions. Our knowledge and expertise on the retirement plans and benefit packages available allows us to help you select the best benefit mix as you prepare for retirement. We specialize in managing assets and retirement planning for two distinct industries:

- Oil Refinery Retirees
- Aerospace Retirees

Award Disclosures: Apriem did not pay a fee to be included in these awards.
For awards criteria and other information: <https://www.apriem.com/client-resources/disclosures/>

F&M Bank's Commitment to OC Endures

Regarded Regional Bank Has Been an Orange County Community Supporter for Over Half a Century

Orange County's most inconspicuous philanthropist, Farmers & Merchants Bank, has been supporting local communities in the OC for over 65 years. If you have been to a non-profit fundraiser, Pacific Symphony Family Musical Mornings concert, Angels baseball game, local Rotary meeting, Chamber event or even a little league game, you have probably seen F&M Bank's logo somewhere. Giving back to the communities it serves has been part of the F&M Bank business model since the beginning. Founded in 1907 by C.J. Walker, Farmers & Merchants Bank provides white-glove banking service to clients at 13 branches across Orange County, as well as 12 other locations throughout Los Angeles and Santa Barbara Counties.

Just this year, F&M Bank provided \$2.3 Million in sponsorships and donations to more than 650 organizations across Southern California, with Orange County organizations garnering more than 60% of the support. Over 300 OC organizations benefitted, whose causes range from fighting food insecurity and providing resources for persons experiencing homelessness, to education, after-school programming, and the arts.



F&M Bank Foundation Co-President, Christine Walker-Bowman (center right), and F&M Bank Foundation Director, Tiffany Roberts (2nd from right), presenting a donation check to Orange-based Illumination Foundation



F&M's team members volunteering as a groundskeeping crew at Mission San Juan Capistrano.

F&M's commitment goes beyond the checkbook, as F&M Bank employees contributed hundreds of hours serving on boards for nonprofits, volunteering at food pantries and youth after school care programs, as well as providing vital financial education to community members. In Orange County specifically, F&M employees contributed volunteer hours this year at Illumination Foundation, Higher Ground Youth & Family Services, and the historic Mission San Juan Capistrano.

Beyond financial support, contributions have come in the form of in-kind donations such as bottled water for charity events, charity auction item donations, and waived fees. As a financial institution, they recognize the importance of providing critical banking services that allow businesses, specifically nonprofits, to be able to serve their missions. The Specialty Lending Department coordinates Tax-Exempt Financing for qualifying entities, allowing their nonprofit clients to obtain loans without the tax implications. This means more money can be utilized for programs or other important expenses that help their constituents.

Faith has been a core value of Farmers & Merchants Bank since its founding. Due to their expertise in the area, a variety of religious denominations in Southern California prefer F&M Bank as their faith-based banking partner. Today, F&M Bank provides banking services and financing to hundreds of faith-based organizations, including houses of worship and schools, across Orange County, Los Angeles County, and Santa Barbara.

Beyond service offerings, F&M's Community Reinvestment Act (CRA) team provides assistance to individuals and small businesses located in their low-to-moderate income service areas. Activities range from direct grant funding and assistance with access to grants, to the provision of community development loans. This is just another example of how F&M deepens its commitment to addressing the banking needs of these organizations.



F&M's team members serving Thanksgiving dinners to families in Anaheim.

F&M Bank supported over
300
Orange County Organizations in 2021

Farmers & Merchants Bank's commitment is not only seen, but felt throughout Orange County's communities. The genuine desire the company has to serve its neighbors and neighborhoods is just another reason why clients and businesses choose to partner with F&M Bank.

For more information on F&M Bank and their products, services, and philanthropy, visit FMB.com.



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Lugano Diamonds Celebrates

HOLIDAY GIVING

It's the holidays – the season for celebration, reflection and for giving to those less fortunate. Lugano Diamonds warmly acknowledges this year's winners of the "Companies Who Care" awards who continually demonstrate caring, concern and support for those in our community.

Lugano Diamonds presents an elegant collection of pieces that reflects its passion for the exquisite beauty, inner fire, and unique physical qualities of some of the world's most prized gemstones.



Under the Mistletoe

These flawlessly crafted drop earrings exude star power this holiday season with more than seven carats of diamonds and spinels working in harmony to provide a picture-perfect example of Lugano's artistry and craftsmanship. Set in 18k black gold.



Superb Majesty

Each Lugano piece begins with gemstones chosen for their exceptional character and superlative quality and then polished to reveal their brilliance and distinctive beauty. These one-of-a-kind meticulously detailed earrings effortlessly show their splendor with 12 mixed shape pink diamonds weighing over five carats and supported by more than one carat of round pink diamonds, all set in 18k rose gold.

Holiday Romance

Sparkling with perfection, no detail is spared in this beautiful pink diamond necklace. Set in platinum and 18k rose gold, the three carats of kite-shaped and round diamonds bring incredible brilliance and sparkle to the celebrate the season.





Ethereal Elegance

Stunning emeralds and dazzling diamonds are always a great way to ring in the New Year. And what better way than with this gorgeous diamond and emerald ring that exudes the ultimate in style and sophistication. Taking center stage is a seven-carat cushion cut emerald with a center fusion cut diamond surrounded by round brilliant collection VS diamonds. Finished in 18k white gold, the ring - both timeless and contemporary - is a perfect piece for celebrating the holidays.

Wrapped in Luxury

The utmost in elegance, Lugano's breathtaking emerald and briolette diamond hoops are classically beautiful and an impeccable addition to any woman's wardrobe. Set in titanium, the hoops feature more than 14 carats of briolette and round brilliant collection VS diamonds surrounded by more than three carats of emerald baguettes in a design that accentuates their exquisite beauty.



Eternal Brilliance

Nothing shines as brightly as Lugano's beautiful green enamel bracelet. This timeless work of art features an endless circle of more than 18 carats of shimmering mix rose cut diamonds encased in exquisite green enamel. All beautifully woven in 18k white gold, this piece will light up her life as the perfect accessory for any occasion.

LUGANO®
DIAMONDS

An experience as remarkable as our collection

View our stunning collection at the Lugano Diamonds Grand Salon located at 620 Newport Center Drive, Suite 100, Newport Beach, and our additional locations in Aspen, Palm Beach and Ocala.



Golf and Giving Back: The Barney & Barney Foundation

Marsh McLennan Agency is committed to serving our community in the moments that matter through the work of the Barney & Barney Foundation. Named in honor of our region's founding agency, the foundation has awarded nearly \$4 million to more than 200 non-profits since 2009.

This year, we are celebrating the total of \$100,000 awarded in grants to three non-profits at our 9th annual Orange County & Los Angeles Golf Classic in October! Thank you to our passionate colleague volunteers, key sponsors Anthem and RT Specialty, and everyone who came together for a day of fun and philanthropy.



This year's grant recipients:



Learn more at BarneyandBarneyFoundation.org



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You Can Help Close the Digital Divide in Orange County

Orange County companies are helping local residents in need by donating used tech devices. You can join the Closing the Digital Divide effort to provide low-income families with access to technology that will help them bridge the socioeconomic gap.

By participating in this eco-friendly program, spearheaded by Orange County United Way and Ingram Micro, the American distributor of information technology products and services, you can be sure your used technology is being reused in a way that is good for our community and the planet.

The digital divide puts people without access to the Internet and other digital technologies at a socioeconomic disadvantage, as they are unable or less able to obtain information, utilize virtual programs for school or work and, consequently, are at a disadvantage to learn and offer skills.

How is technology helping OC residents?

Orange County United Way utilizes donated laptops and cellphones to support three key initiatives:

- **United for Student SuccessSM:** To help Orange County students and their families from underserved communities succeed in school and beyond.
- **United for Financial SecuritySM:** To help Orange County program participants access job training, financial coaching, and tax preparation services.
- **United to End HomelessnessSM:** To support formerly homeless Orange County residents and families recently housed through our WelcomeHomeOCSM housing navigation program to further their journey to stability.

By creating more access to technology, we're working to ensure our students succeed, our families gain financial security, and our recently housed neighbors remain in their homes for the long term.



Donate Your Used Technology and Help Close the Digital Divide

PROCESS



Ingram Micro will:

- Arrange for the pickup of the systems
- Erase all company data and software
- Install new Microsoft licenses
- Clean and prepare the systems
- Facilitate the donation
- Provide disposition documentation

DISTRIBUTE



Orange County United Way will:

Put the systems to good use right here in Orange County as part of our Closing the Digital Divide effort.



"I had always used the school computer, but was unable to do so during the pandemic. If you don't have a laptop for school work, you already have a disadvantage. This program has taken a big weight off of my shoulders—I feel relieved."

—Alexies, Class of 2021 e-Mentorship Program Graduate and Laptop Beneficiary

To find out how you can help close the digital divide, contact Doug McKay

DougM@UnitedWayOC.org

949.263.6125

Todd Zegers: Leading the Charge for Digital Equity in Orange County



Todd Zegers is an experienced global technology supply chain executive with a proven history of delivering rapid growth and profitability. As the Leadership Council Chair for Orange County United Way's United for Financial Security initiative, Zegers has spearheaded the Closing the Digital Divide effort. Under his guidance and leadership, used laptops and cell phones are being collected, refurbished, and distributed to Orange County residents in need.

INGRAM MICRO

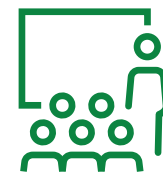
"Access to technology elevates quality of life and enhances future opportunity across our global landscape. COVID has highlighted and amplified the challenges faced by individuals and families who cannot afford computers to support the interactions necessary for jobs and school."

—Todd Zegers, Global Vice President – ITAD & Reverse Logistics, Ingram Micro

When our residents are equipped with technology, they are more readily able to:



Participate in and contribute to a thriving economy.



Excel in work and school.



Learn about and apply for jobs, scholarships, and college.



Access and utilize support services.

DID YOU KNOW?



Last year, 2,700 OC high school students did not graduate.

This holiday season, let's be United for Student SuccessSM to ensure Orange County's students graduate on time and bridge the learning divide.

Join us in helping 300 OC high school seniors from underserved neighborhoods graduate on time and ensure they are college-, career-, and life-ready. Your gift to the Class of 2022 e-Mentorship Program will support three components ▼



UNITED FOR STUDENT SUCCESSSM
Empowered by Orange County United Way



e-Mentorship

300 students will be paired with mentors to get professional advice and perspectives.



Virtual Workshop Series

The robust programming teaches students essential skills to help them thrive beyond high school.



Laptop & Technology Kit

Provided to all students who successfully complete the e-Mentorship Program and graduate high school.

\$1,000 per student



Every donation, big or small, will have a significant impact on the future of these students. Donate now!
GoFundMe.com/Class2022



"My mentor was really supportive and helped me through some rough patches—and she made me proud of what I've done. It's empowering to have someone I can count on and learn from—especially as a first-generation student."

— Isabel, Class of 2021 e-Mentorship Program Graduate

For more information, please contact Mike Olson,
Senior Manager of Individual Giving at
MikeO@UnitedWayOC.org.



Jobs for All: Goodwill and 100+ Local Businesses Help Empower through Employment



For many, a job means more than just a paycheck. It's an opportunity to build a career, find purpose and reach their highest potential. For many, it's the first time they are being seen for what they can do, not what they can't.

Goodwill of Orange County is proud to partner with many leading Orange County businesses to empower through employment. Goodwill has nearly 100 years of experience matching the needs of employers with employees who have the skills you need and are eager to get to work.

By hiring from Goodwill of Orange County, you are often giving someone their first chance to prove themselves, their first chance at independence, their first chance to thrive.

A Job for Carter

Carter is the unofficial mayor of Chick-fil-A on El Toro Rd. in Laguna Hills. Team members and customers alike are delighted to see him at work every day. And he shows up every day without exception with a smile on his face.

Carter's job responsibilities include keeping the parking lot and outdoor patio areas clean and tidy for guests, sweeping the floors, and his favorite – customer service. Carter loves to interact and welcome guests. He makes sure every guest feels appreciated and important. His caring approach is contagious, and his team members can't help but model the exemplary customer service he provides for all.

Carter found employment through Goodwill's Employment First program, a workforce development program that increases employment opportunities for individuals with developmental disabilities to work as independently as possible.

With the support of his job coach, Carter has thrived working at Chick-fil-A for more than four years now.



A Job for Noemi

Entering the workforce for the first time, Noemi was unsure what she could do and who might hire her. As a Deaf woman, she thought it would be nearly impossible to find the right job fit.

With the help of Goodwill's Deaf Services program, Noemi landed her first job in the dining facility of a local military base.

Goodwill of Orange County opens doors by providing services to help the Deaf and Hard of Hearing enter the workforce and obtain sustainable employment.

Noemi already had the potential, Goodwill just provided the tools and development to help her unlock it.

OUR VISION

We envision a community where there is a job for everyone who wants one.

These are just two examples of O.C. employers partnering with Goodwill to provide a great job to a qualified candidate who was ready and eager to work. Are you ready to do the same? Join us in changing lives through meaningful employment.



Chick-fil-A • Party City • Chic Catering •
Anaheim Majestic Resort Hotel • SkyCo
• Infinite Electronics • Bracken's Kitchen
• Assistance League, Laguna Beach •
File Depot • Habana Restaurant •
Heritage Museum • Irvine Roller Rinks

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THANK YOU FOR BEING A COMPANY THAT CARES.

Tustin Senior Center • Newport Rib
Company • Yorba Linda Chamber of
Commerce • Kiva Container • Red
Lobster • The Little Market • McCormick
and Schmick's • Underhill Industries •
White Bottle • Edward's Parking Lots

By hiring through Goodwill of Orange County, you have given purpose, pride and dignity to individuals facing barriers. Thank you.

These are just a few of the hundreds of O.C. companies who have hired through Goodwill of Orange County's workforce development programs this year. If you are looking to hire new team members, consider partnering with Goodwill. We have eager, qualified candidates ready to work. You'll find the impact is incredible—on the individual and on your business.



CONTACT ERIC BISAILLON, BUSINESS DEVELOPMENT MANAGER, TO GET STARTED
ERICB@OCGOODWILL.ORG | 714.541.2540 X 4007.

We'd like to introduce you to Mariah.

She's a fourth-grade student enrolled in Think Together and has been going to her afterschool program since Kindergarten.

Her story, like many of our students, is that Think Together has become a second home. Especially after a year of disruptions, she's excited to be back and make more memories during this school year.

"LAST YEAR WAS KIND OF TOUGH," MARIAH SAYS.

**"I COULDN'T HANG OUT WITH MY FRIENDS OR DO MUCH,
AND I DIDN'T LEAVE THE HOUSE."**



Currently, Mariah's favorite subjects in school are science and reading. She's grateful for Think Together for helping her bring her grades back up and have a place to play games and reconnect with friends and classmates.

Thanks to donors like Pacific Life, kids like Mariah will receive an additional 540 hours of academics and social-emotional development each school year. Their support allows our students to have more opportunities for success with access to art, enrichment, and homework support.

Pacific Life and Think Together have a long history, dating back to the early 1990s, when Darlene Gerken, wife of Pacific Life's then—CEO Walter Gerken, began serving as a volunteer tutor at Think Together's Shalimar Teen Center in Costa Mesa shortly after the center opened.

Darlene continued to serve in that capacity at Shalimar into the next decade, and although she passed away in 2009, and Walter in 2015, their family continues to hold this connection very dear. When Think Together celebrated Shalimar's 25th Anniversary in November of 2019, two of the couple's six children—David and Andrew, along with Andrew's wife Catharina—attended as honored guests.

In more recent years, the Pacific Life organization has been very active in giving circles and employee volunteer events throughout Orange County and beyond, helping students like Mariah with access to equitable educational resources.

Five years in Think Together is a long time, and when Mariah was asked what her favorite memory is, she immediately said, "My favorite memory is the time I met my site coordinator and program leaders for the first time. I knew this was going to be a good program where I would have friends, be supported, and have fun."

Students like Mariah need support so they can continue to have a safe space and access to all that Think Together has to offer. We thank Pacific Life and all of the companies who care about students and their success in their education journey.

This season we ask you to help us light the way to a future full of opportunities for students all across California. Support our mission to change the odds for kids, because the best gift you can give is giving a student the opportunity to succeed.

To help Light the Way, visit ThinkTogether.org/give





Think Together is proud to acknowledge our OC business partners for their commitment to **changing the odds for kids.**

TOGETHER WE
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the way

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Deloitte • DJM Capital Partners • Edwards Lifesciences • Google • Kaiser Permanente
Majestic Realty Co. • Medtronic • Nikols Company • Pacific Life Foundation
PIMCO • Pioneer Circuits, Inc. • Southern California Edison
State Farm • St. Joseph Health • Target

thinktogether.org

Accelerating Nonprofit Success



V|LEAD: A Means to Tackling Nonprofit Board Diversity Issues In Orange County

The year was 2017. OneOC Board Member and CEO of The Wooden Floor, Dawn Reese, was in Seattle for the BoardSource Leadership Forum, a national conference focused on nonprofit leadership at the highest level – the board of directors. Every three years, BoardSource would host this gathering of nonprofit professionals and board members, and publish the results of their triannual study, *Leading With Intent*. One of the study's key findings struck Reese, a leading board governance practitioner and an advocate for low-income communities in Santa Ana: "Nonprofit boards are no more diverse than they were thirty years ago." She took this staggering statistic as a call to action.

Upon her return to Orange County, she called Tim Strauch, President & CEO of OneOC, and the organization's Board Diversity Taskforce was born. At the time in 2017, just a few short years ago, OneOC's board skewed disproportionately toward a single race and gender demographic. Within a year-and-a-half, OneOC was able to transform their board composition to 50% men and 50% women, with 6 out of 7 of their newest board members identifying as persons of color. After working with OneOC's Board Governance Committee to develop a pipeline of diverse candidates for future volunteer leadership positions, the Board Diversity Taskforce focused their efforts outward.

OneOC's mission is to accelerate nonprofit success, and this mission often engages a variety of stakeholders. Under the leadership of former Director of Business Development & Partnerships, LaVal Brewer, and OneOC Board Member Charles Chung, the Board Diversity Taskforce planned for a gathering that would bring together nonprofits, companies, and volunteer leaders of diverse backgrounds. Held at Chung's alma mater, Experian's office in Costa Mesa, on February 29, 2020, OneOC's Inaugural Board Diversity Summit brought together over eighty nonprofit, corporate and community leaders to discuss the lack of diversity amongst nonprofit boards. OneOC took the opportunity to introduce a pilot program, V|LEAD: Volunteer Leadership Engagement to Achieve Diversity, as a means to tackling this issue. Intended to launch shortly after the Summit, the V|LEAD program would cultivate diverse nonprofit volunteer leaders by enabling companies to invest in board governance and DEI training for their high-potentials, culminating in a skills-based volunteer placement with a partner nonprofit. Concurrently, nonprofits would participate in a similar curriculum, addressing any readiness issues that inhibit them from successfully onboarding and immersing a diverse volunteer leader into their organization. Just two weeks after the Summit, however, the coronavirus pandemic led to a nationwide shutdown, and the Board Diversity Taskforce decided to put V|LEAD on pause.

A few months into the pandemic brought social justice inequities to the forefront and, in turn,

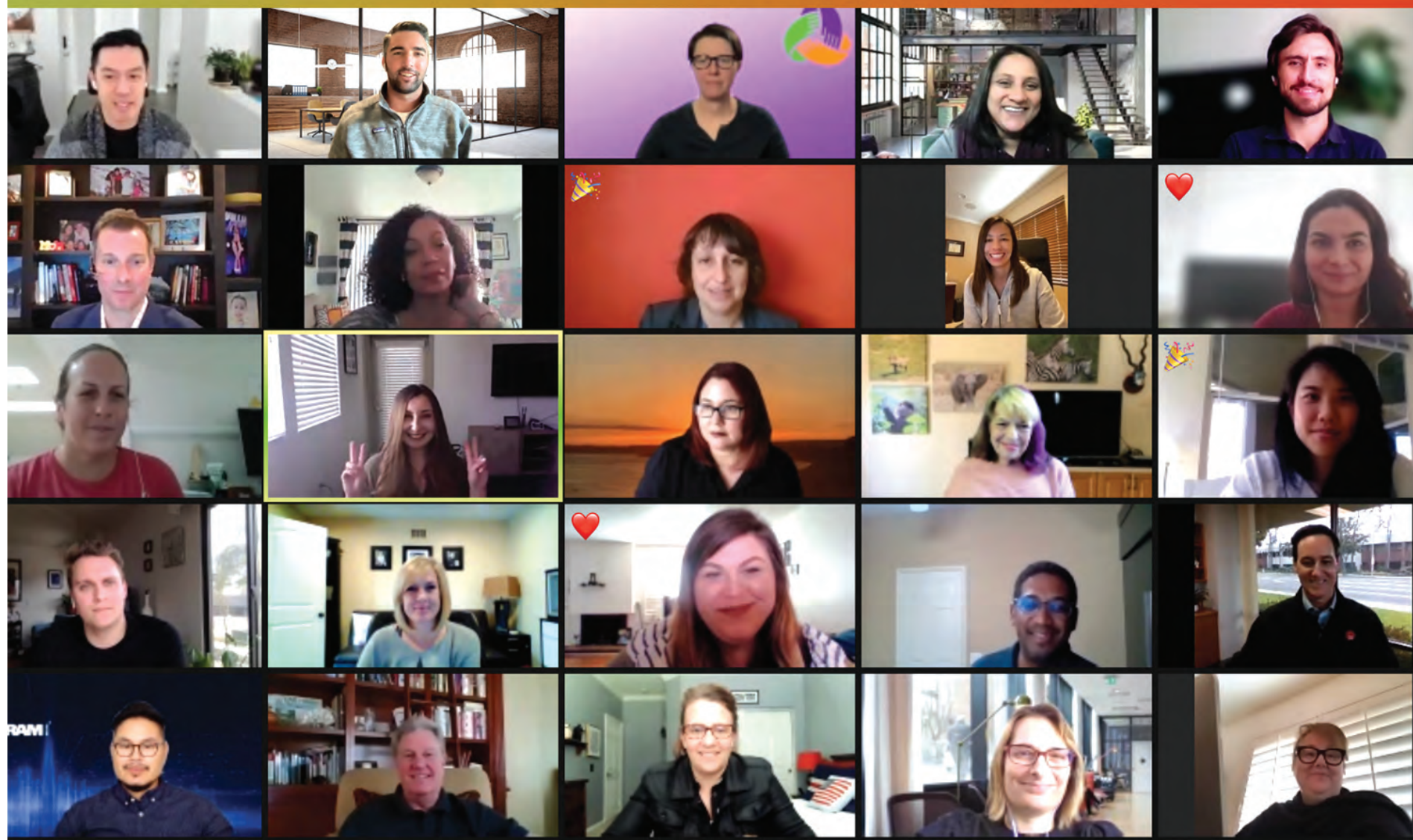
the resurgence of the Black Lives Matter movement. The Board Diversity Taskforce reconvened and decided to launch V|LEAD in early 2021. An official statement from Chung to prospective corporate and nonprofit participants read, "Now more than ever, our communities need support to meet the challenges of both the global pandemic and local social issues. Research, data, and experts show that diverse leadership leads to accelerated mission accomplishments, greater positive impact, and increased creativity and innovation to solve difficult social issues. To drive these changes, OneOC is committed to developing and cultivating an abundance of diverse leaders in both the nonprofit and for-profit sectors. V|LEAD is the way to champion this cause and take action."

OneOC engaged OC Human Relations as a co-facilitator of the program, which launched in February 2021. The pilot cohort consisted of fifteen volunteer leaders (affectionately dubbed "V|LEADers") from eight participating companies, and representatives from six nonprofit organizations in Orange County. Over five months, the pilot cohort was taken through concurrent curriculums of best practices in board governance and nonprofit volunteer leadership, and approaches to diversity, equity, and inclusion on individual and organizational bases. One of the program's hoped for outcomes was to shift the mindset of traditional nonprofit board recruitment from parachuting in leaders at the highest level based on their pedigree or prospective financial contributions, to creating a pipeline of diverse volunteer leaders by providing opportunities at the committee and taskforce level that would enable them to successfully acclimate into and elevate through the organization over time. After completing the learning portion of the V|LEAD program, held in a virtual classroom, each V|LEADER was connected to a nonprofit for a skills-based volunteer opportunity based on interests, experience and need. While the pilot program will formally end this month, V|LEADers and nonprofits are encouraged to continue working together.

OneOC is already working with members of the Board Diversity Taskforce and partner, OC Human Relations, to plan its program for next year, set to launch in March 2022. In addition, OneOC will be working with community partners to share the learnings from this program with a broader audience. Said of the program by nonprofit and V|LEADER participants respectively, "I love the intention of this program. I would enthusiastically recommend this program..." and "Great pilot, keep it up and this will add tremendous value to nonprofits and our communities as a result."

If you are interested in learning more about V|LEAD, please contact the program's champion, Amanda Green, at agreen@oneoc.org.

2021 V|LEAD Cohort



V|LEAD Class of 2021

In 2021, OneOC launched "V|LEAD: Volunteer Leadership Engagement to Achieve Diversity", an initiative aimed to cultivate diverse nonprofit board members and volunteer leaders in our community. In partnership with OC Human Relations, OneOC provided training support to fifteen volunteer leaders from eight companies and representatives from six partner nonprofits in the areas of volunteer leadership and best practices in diversity, equity and inclusion. Congratulations to our Inaugural class!

NONPROFIT PARTICIPANTS

FAMILIES FORWARD
DIGNITY • EMPOWERMENT • HOPE

Bob Davis
Elizabeth Childs
Madelynn Hirneise
Victor Cao



Alison Edwards
Karen Stoyanoff



Barbara Wiggs-Nelson
Lori Butler
Sue Bright

the wooden floor

Cath MacIver
Dawn Reese
Rich Lee



Iliana Soto-Welty
Rhiannon Doscher



Angie Rowe
Jeri Konopisos
Kevin Fuhrmann
Meredith Cagle

2021 V|LEADers



Max Trichet

PIMCO

Atousa Eguilada



Ann Wilson

Western Digital

Michelle Lum



Geoff Kissel
Jason Gage
Suzanne Chatterton



Debbie Chamkasem
Jose Pallares



Eniko Bolivar
Juriana Sperandio



Colby Dyer-Tait
Meggen Gullo
Milton Acosta
Selena Knippen

For more information on V|LEAD and how to get involved in 2022, email agreen@oneoc.org.

Thank you V|LEAD Partners and Sponsors!

CHARLES AND INJA CHUNG





Corporate Social Responsibility: Why It Matters and How to Make It Work

Yes, your business exists to serve your customers and to make a profit. But these days, many people add another obligation to that list. They want to know: what is your business doing to improve society, to contribute to the greater good, to give back?

Corporate social responsibility is the answer to that question. Many businesses, especially in the tech sector, are expected to benefit their communities in ways that stretch beyond the usual definition of doing business. These can include encouraging volunteerism, directing philanthropy and giving, creating community-friendly hiring practices, and operating with environmental sustainability.

In fact, younger generations increasingly demand corporate social responsibility from the companies they do business with. 32% of Millennials back away from businesses they consider socially irresponsible, and fully 70% of Gen Z customers deliberately choose to do business with socially responsible companies. Because of this, it's important now more than ever to consider what obligations your organization has to your community and how you can go about showing that you care about more than the bottom line.

How Companies That Care Can Make Their Communities Better

Companies that care can do a lot to boost their local communities or even to help improve life on a national or global level. In 2019, enterprise-sized corporations donated more than \$26 billion to nonprofits, making up about 25% of charitable giving overall. The bulk of this giving focuses on educational programs, health/social services, and community development.

In many cases, corporations match the charitable gifts made by their employees, boosting the causes their people care about. Near the top of charitable matches are those from Google, which matches up to \$12,000 per employee, and \$10,000 matches from Boeing and Chevron.

In addition, many socially responsible companies encourage their workers to volunteer, sometimes paying their employees for volunteer hours. Apple, for example, will pay employees \$25 per volunteer hour through its corporate social responsibility program, Starbucks offers up to \$1,000 for volunteer hours, and Walmart pays \$10 per hour. Other companies, including ExxonMobile and Verizon, provide grants to employees' favorite nonprofits based on hours volunteered.

The Benefits of Corporate Social Responsibility

When companies practice social responsibility and seek to give back to their communities, everyone benefits: employees, customers, and the companies themselves.

How Corporate Social Responsibility Benefits Employees

Employees feel proud when they work for companies that practice social responsibility. They stay more engaged and invested in the company's mission when they know that the values and causes they care about garner respect within the corporate walls.

That's important because employees are often at the core of any program designed to give back to the community. They drive the volunteer efforts and act as the first line of public relations for your company by expressing their pride in where they work.

The vast majority of employees express a greater sense of fulfillment at work thanks to their organization's corporate social responsibility program, with 65% attributing their retention to the program. Additionally, 83% of Millennials say that corporate contribution to social and environmental issues is important to their sense of company loyalty.

How Corporate Social Responsibility Benefits Your Customers

Many consumers, especially those in younger generations, consider their purchasing decisions a statement of their values. They deliberately do business with socially responsible organizations, often even more than they contribute to charity themselves.

As a result, consumers feel good about socially responsible companies, especially those that support the environmental, social, or educational values and causes that customers hold dear. Millennial and Gen Z customers also

expect certain behaviors from the companies they support. They want to do business with companies that treat their employees and customers well, that minimize pollution and energy consumption, and that visibly and actively support their local communities.

How Corporate Social Responsibility Benefits Your Company

When you practice corporate social responsibility, you do good for your own company while doing good for your community. Consumers are more likely to flock to you, as are the job seekers and top talent you want to attract. In fact, 84% of job candidates state their willingness to leave their current position if recruited by a company with the kind of good reputation that accrues to socially responsible organizations.

In addition, your PR and marketing departments can make gold out of your social responsibility efforts, building events and even whole campaigns around them. On top of that, you get the satisfaction of knowing you're helping to make your community a better place to live.

How Your Company Can Give Back

Your company has plenty of choices when it comes to giving back and exercising your social obligations. Start by choosing one or two causes that you and/or your employees are passionate about. These can be anything from supporting a local school or sponsoring local charity events to find clear ways to combat climate change. Choose causes that align with your corporate values and where you can make a visible difference, which may vary depending on the size of your business.

Direct philanthropy is always an option, as are matching programs that double the donations your employees make. When you work side-by-side with your employees, you can magnify the number of causes you support, tying your corporate giving to your employees' passions.

In addition, encouraging volunteerism is a great way to support your employees and community at the same time. Offer your employees paid time off for their volunteer work, or make grants to local nonprofits based on volunteer hours. This type of program spreads your reputation for good works while boosting the connection your employees feel toward your business.

Finally, keep in mind that younger generations of employees are watching to see how you're doing in terms of environmental leadership and ethical labor practices. Check your corporate policies and procedures to see how you can reduce carbon emissions, establish or expand your recycling program, and offer socially responsible benefits such as parental leave or tuition reimbursement.

At Marquee Staffing, we have always made it a point to be involved in our local communities and support nonprofit causes we care deeply about. These include Maryvale LA, a mental health care provider and Los Angeles's oldest children's charity; Children's Hospital of Orange County (CHOC); and JDRF, the world's largest funder of research into Type 1 diabetes. We support their good works through events, fundraising, and donations, and we encourage our employees to do the same.

Claudia Perez Sr. Vice President of Operations

As the Sr. Vice President of Operations, Claudia Perez oversees day-to-day strategic operations, including spearheading marketing projects, employee training and development programs for Marquee Staffing's contingent workforce. With her strong background in business development, she continuously strives to build lasting partnerships with clients and candidates. As a result, her team focuses on quality, customer service, compliance and strategic placements.





THE TALENT YOU'RE LOOKING FOR ISN'T LOOKING FOR YOU

Marquee knows where to find them and how to land them.

The best and brightest are currently employed – they aren't scouring job boards. At Marquee Staffing, we are talent hunters. We know how to uncover the best and turn their heads.

MARQUEE STAFFING WILL:

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- Position your opportunity as their ideal career move.
- Shorten searches for critical and challenging roles.

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Tap our talent pipeline and edge out the competition with Marquee Staffing.



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UCI RESIDENT SHARES HOW TGR FOUNDATION SUPPORTED HIS PATH TO MEDICINE



Dr. Timothy Vu immigrated from Vietnam to the Little Saigon community in Orange County 26 years ago. As he navigated life in America, he knew he could overcome his obstacles if he saw them as motivation to fuel his success.

With a network of support from family, teachers and TGR Foundation's Earl Woods Scholar Program, Vu became the first in his family to graduate high school and went on to earn a bachelor's degree in Biology and English from the University of California, Los Angeles. He later completed medical school at the University of California, Irvine, while simultaneously earning his Master of Business Administration.

Between shifts as an Internal Medicine Resident at UC Irvine Medical Center, Vu opened up about his path to medicine and the support he received along the way.

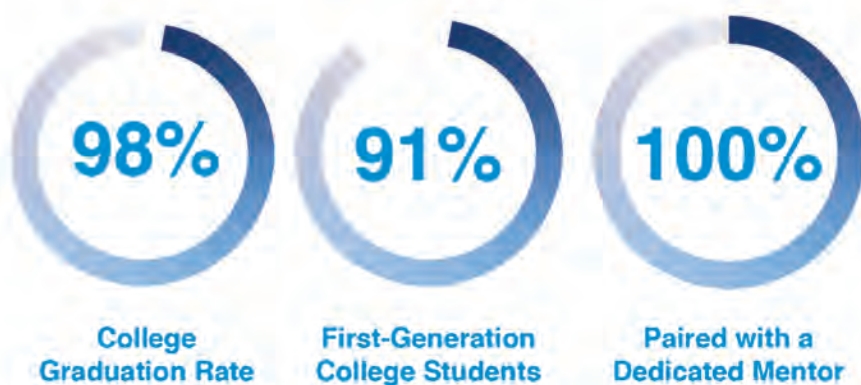
Did you always want to be a doctor?

I started college wanting to be anything but a doctor because I always had bad experiences with health care. Whenever anyone in my family would get sick, I remember how much my parents would hesitate to seek medical assistance because they did not understand how to navigate the system and feared the potential financial burden on our family. However, all that changed during my third year of college.

What made you decide to pursue a career in medicine?

As part of the Vietnamese Community Health Club, I took part in quarterly health fairs in the Little Saigon area. As I interacted with patients and learned about their lives and struggles, I saw that the health disparities and socioeconomic barriers that I faced during my upbringing were also prevalent in the local communities around me. I then realized that I wanted to become a physician who can provide medical support and advocate for these men and women.

Earl Woods Scholar Program By The Numbers



How did TGR Foundation's Earl Woods Scholar Program support you during your academic journey?

As an Earl Woods Scholar, TGR Foundation provided me with a wealth of resources from a stable support system that was always ready to assist me to internship opportunities to expand my professional development and access to incredible mentors who helped me lay down the foundation to succeed in life.

TGR Foundation has been there for me since the beginning, always exceeding my expectations and always believing in me, even when I hesitated to believe in myself."

What role did mentorship play in your academic success?

Mentorship has been critical to my success. As an Earl Woods Scholar I was paired with my mentor, Dr. Jean Gehricke, a Child Psychologist with the Center for Autism and Neurodevelopmental Disorders at UC Irvine for my four years at college. In addition to providing me with professional advice and tips on how to succeed in the different junctions of my journey, Jean has always been an amazing pillar of support for me.

During one of my internships, I was also connected to Dr. Martha Sosa-Johnson, an Internist who is a primary care provider at UC Irvine. She has also been a stable presence in my life, never hesitating to take time out of her busy schedule to provide me with words of support and guidance.

I have always valued the importance of providing support for others, just as TGR Foundation and my mentors have provided support for me throughout the years."



What are your professional goals and plans for the future?

My current goal after finishing my Internal Medicine Residency is to further subspecialize by doing a Pulmonary and Critical Care fellowship. As I look further ahead, I want to be an advocate for underserved communities, an ally for socioeconomically challenged families and a trustworthy doctor for vulnerable populations around me.

How do you plan to pay your experiences and support forward?

One day soon, I hope to build a practice in or near the Little Saigon area that I grew up in. I wish to give back, pay it forward and become an individual who can bridge the generational, cultural and language barriers in order to better assist my patients across the healthcare continuum. I want to create an impact for these patients, a long-lasting change in their lives that they can then pass on to their loved ones.

Visit TGRFoundation.org to learn how you can support students on their path to college and career success.



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STEAM vs. STEM

It's Time to Embrace the Power of "A" for the Arts

By Dawn S. Reese, Chief Executive Officer, The Wooden Floor

It is time to embrace the Power of the Arts. Why now, more than ever? Artificial intelligence is here. AI is everywhere. AI is moving at a fast speed. However, at the same time, we are in the midst of a world-wide pandemic which is creating severe learning losses, as well as social and emotional wellness challenges for our most vulnerable children in our community. During these unprecedented times, how can students keep up with the warp speed of change that will be required to thrive in a 21st Century economy and a workforce based in STEAM (Science, Technology, Engineering, Arts, and Math), which is poised to lead in an AI ecosystem? While the power of the arts is central to Orange County's creative and innovative economy, The Wooden Floor believes art is also a catalyst for socio-economic equity, building healthy communities and social change to help move young people forward.

The Wooden Floor is taking a long view on the impact the pandemic is having on children because we make a 10-year commitment to our 475 students and their families, and our long-term vision is to break the cycle of poverty through generational change. We are one of the foremost creative youth development nonprofit organizations in the nation. Since 1983, The Wooden Floor has served over 95,000 youth, and our strategic solution to today's greatest social challenges is to transform young people in low-income communities through the power of dance and access to higher education. **Since 2005, 100% of our graduates have enrolled in higher education.**

In 2018, The Wooden Floor's Board of Directors and Executive Staff began exploring the impact that artificial intelligence would have on defensible job skills, and our early research was informed by advisors such as Chief Economic Advisor of the Orange County Business Council, and Chief Academic Officer of Orange County Department of Education. They shared forecasts through 2040 about changes in the Orange County workforce, demographics and education. Through this lens, we see that for students to achieve social and economic equity in an ever-evolving, automated, and creative economy, The Wooden Floor's creative youth development approach must align with what they shared as fostering the 5 Cs: Communication, Collaboration, Critical Thinking, Creativity, and Character. At The Wooden Floor, we foster a sixth C: Courage. We are intentional about how our programming advances these traits and skill sets to prepare our students for what is described as the "Fourth Industrial Revolution" workforce wherein humanity intersects with artificial intelligence.

The Wooden Floor and our community of supporters know that when young people incorporate the 6C's in school and in life, they will be future-ready to step into careers which have not yet been imagined today. We continue to study these external trends to inform how we help prepare our youth for success today and in the workforce they will enter. Additionally, The Wooden Floor's 10-year Longitudinal Study (2014-2024) provides evidence of students' acquisition of developmental assets represented by the 6Cs.

Dance is the Answer™

- Over the past five years, nearly **50% of The Wooden Floor graduates major in STEAM subjects:** Engineering (Aerospace, Biomedical, Computer, Civil, Mechanical), Economics, Biology, Marine Biology, Neurobiology, Biochemistry, Biotechnology, Forensic Science, Pre-Med, Nursing, Psychology, Mathematics,

Arts (Animation, Dance, Design, Film, Music), Business, Education, Journalism, Human Services, and Sociology.

- **100% of our graduates enroll in higher education since 2005,** as compared to 50% of their socioeconomic peers.
- **54% of our alumni have graduated from colleges and universities since 2005,** with a Bachelor's or Master's degree, as compared to 12%* of their socioeconomic peers.

*National Student Clearinghouse Research Center

We thank the companies, foundations and individuals who care about our students through their stalwart support as Lead Class Partners and Class Partners of our high impact College and Career Readiness Programs.

From what The Wooden Floor has learned over nearly two years of the pandemic from our students, we are enhancing our dance education, college and career readiness, and family services programs. **We are keeping laser-focused on the longer-term goal to ensure that our students emerge from the pandemic with the social, emotional, and academic well-being needed to keep their big dreams intact for their bright futures ahead.**

As we look to 2022, The Wooden Floor will strive to sustain the same high quality outcomes that our students, their families, and our community have come to expect from us. These successes are made possible due to a loving community of supporters. **It takes all of us, moving as one community, to accomplish this.**



At just 15 years old, Ashley has a maturity and determination beyond her years. The oldest of three siblings, she is an exemplary student, maintaining a 4.0 GPA. Now at the start of her sophomore year, she is on track to graduate high school with the head start of having her Associate's Degree completed as well. She then hopes to take steps towards becoming a pediatrician, a dream inspired by her own doctor. Ashley knows the power of community, and cites her role models at The Wooden Floor as a source of her strength.

To learn about ways you can make a difference at The Wooden Floor, please contact **Tianna Haradon**, Director of Development at 714.541.8314 ext. 124 or Info@TheWoodenFloor.org.



Dawn S. Reese, Chief Executive Officer of The Wooden Floor, is a social innovator who leverages her unique blend of experience in business, technology, education and the arts to propel young people forward. During Reese's 13-year tenure, The Wooden Floor has seen significant growth and with the opening of its second location in Santa Ana, and licensing of its model in Washington, DC. Reese received the **2020 Women of Distinction Award** from **34th CA Senate District**, **2019 Women Breaking Barriers Award** from **Connected Women of Influence**, the **2018 Founders Award** from the **Institute for Community Impact**, the **2016 Center for Leadership Award** for Innovation from **California State University Fullerton**. Dawn serves on the Board of Directors for **OneOC** as Treasurer, **Orange County Music and Dance**, **Passkeys Foundation** as Board Chair and the **Santa Ana Chamber of Commerce**. She is on the Board of Advisors for the **Center for Leadership - College of Business and Economics at California State University, Fullerton**. Reese began the first part of her career in management consulting specializing for the high technology industry, and was the Founding Executive Director of the Software Council of Southern California, and currently she is an evaluator on OCTANE's Nonprofit Accelerator Panel. Reese is an author, mentor, consultant, and national conference presenter on topics of strategic planning, board governance, leadership development and creative youth development.

TheWoodenFloor.org [DawnSReese](https://www.linkedin.com/in/dawnreese)



WE ARE CREATING **GENERATIONAL CHANGE THROUGH THE POWER OF DANCE**

Founded in 1983, The Wooden Floor is one of the foremost creative youth development nonprofit organizations in the country. We transform the lives of young people in low-income communities through the power of dance and access to higher education.

We give young people the tools and guidance to follow a path out of poverty by serving students in grades 3-12 after-school for up to 10 years with a comprehensive approach that is grounded in exploratory dance education which is strategically integrated with long-term mentoring relationships, academic services, college and career readiness, and family support services.

In Orange County and through national licensed partners, our long-term approach fosters the confidence and gifts within each child to innovate, communicate, and collaborate - skills necessary for success in school and in life.

100 percent of students who graduate from The Wooden Floor immediately enroll in colleges and universities across the nation.

Students at The Wooden Floor consistently exceed their peers nationally. Our students become change agents and beacons of hope within their own families, their neighborhoods, our community, and our world.

JOIN US TO MOVE MORE YOUNG PEOPLE FORWARD.

Find out more at **TheWoodenFloor.org**

from here you can step anywhere
the wooden floor®

How to Choose a ~~Spouse~~ Divorce Attorney?

By Paul Nelson, Esq.

Here's irony for you: To escape one's relationship—your marriage—you must create another relationship—with your divorce attorney.

And just like a marriage, your attorney-client relationship will require commitment, demand honesty, and often hinge on compromise. The difference? Unlike a marriage, your relationship with a divorce attorney is designed to be short-lived.

Even so, you should look for a lawyer much like you would a spouse. Accordingly, here are some tips when divorce attorney seeking:

1. Ask for References

Matchmakers have been around for centuries. Many cultures still use them to pair compatible mates from the pool of local singles. Even in our more “liberal Western culture, it's still common for friends to set each other up with dates, and for people to seek the approval of family and loved ones before getting “serious” with a potential husband or wife.

Likewise, when looking for an attorney, it makes sense to ask the advice and seek references from others in your professional circle, such as your CPA/financial advisor, business lawyer, or business coach.

2. Locate a State Bar-Certified Specialist in Family Law

One of the best sources to find an

attorney is the State Bar website. The State Bar of California maintains a list of members who are Certified Specialists in their area of law. Each attorney has met substantial law practice and educational requirements in addition to receiving favorable evaluations by other attorneys and judges familiar with their work in a particular legal specialty.

3. Assess Chemistry

Relationships that work on paper don't always do so in real life. That's why, no matter how well a divorce attorney may be rated, you need a sit-down to see if you “click.” As with a personal relationship, make sure your values and expectations are in sync. If not, you may be dealing with a professional divorce—along with your marital one.

4. Discuss Money

Before committing to marriage, it's common for couples to talk about how they will handle finances. This can be uncomfortable, but it's an issue that must be faced head-

on to avoid long-term problems. Likewise, when talking with an attorney, fees and expenses must be addressed up front. Also, don't be fooled by what appears to be a low hourly rate. An inexperienced attorney may charge less by the hour but require more time to accomplish what a more skilled and expensive lawyer could do in far less time.

5. Exchange Vows

Once you and your selected attorney are ready to commit, it's time to exchange vows. Although these don't yet have the traditional caché of “to love, honor and cherish,” they nonetheless express the ideal behaviors to which both parties should aspire:

• Lawyer's Vows:

- ✓ I vow to advocate for your position zealously and effectively.
- ✓ I vow to maintain confidentiality ‘til death do us part.
- ✓ I vow to interact with

opposing counsel in a dignified, yet assertive manner.

- ✓ I vow to provide direct and unambiguous advice.
- ✓ I vow to take reasonable legal positions based on the law as it is or should be.

• Client Vows:

- ✓ I vow to be honest with my attorney.
- ✓ I vow to collect and share information with my attorney.
- ✓ I vow to adhere to instructions on behavior in and out of court.
- ✓ I vow to be responsive to my attorney's requests.

A divorce is a painful and demanding process that can trigger extreme emotions. Yet if you have an attorney whom you trust, you can minimize the discomfort and emerge in a better position to start the next phase of your life.



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With our commitment to helping others, Nelson Kirkman goes beyond resolving high stakes family law matters. Whether assisting our clients or those families in our community that need some support, we are there to help.

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Green Deposits: An opportunity for socially responsible short-term investing

Addressing environmental, social and governance (ESG) issues has become a major focus for corporations. In a recent development, corporate treasury departments can now contribute to enterprise wide ESG efforts by adopting a basic liquidity management product that a handful of banks are beginning to offer: green deposits.

THE EMERGENCE OF ESG INVESTING

ESG encompasses a broad range of issues—ranging from climate risk and solar and alternative energy (environmental), to pay equity and good corporate citizenship (social), to cybersecurity and diversity initiatives (governance).

The importance that corporations across the globe are placing on achieving ESG objectives continues to grow. As such, more and more companies are looking to integrate ESG into how they deploy their investment dollars. The result has been a shift toward more socially responsible investments that align with corporate values.

GROWING DEMAND FOR A SIMPLER ALTERNATIVE

To address this shift, many ESG investment alternatives have emerged. However, until recently, most sustainable investment alternatives have been in off balance sheet asset classes, with companies investing directly in the debt or equity of individual companies with strong ESG performance records and initiatives, or in debt or equity ESG funds.

The challenge of investing in such asset classes is they expose a corporation to higher volatility, particularly when investing directly in debt or equity. Investing in ESG-strong companies and funds may require revisions to a company's investment policy and is complicated by an increasingly confusing landscape:

- Many ESG-focused companies tend to be in newer and less understood industries.
- A growing number of ESG research firms as well as more traditional credit rating agencies are ESG-scoring companies, but no one uses the exact same standards.
- The number of indexes that now benchmark ESG investment performance has risen above 1,000.
- Standards continue to evolve for corporate ESG reporting.

As a result, companies investing in these asset classes to pursue ESG objectives can find it more challenging and expensive than traditional investing.

Often, it requires the assistance of a specialist external investment manager or internal staff dedicated to monitoring and managing the performance of those investments.

These complications have created a rising demand for simpler, more familiar ESG investment alternatives.

HOW GREEN DEPOSITS FILL THE VOID

A new short-term investment option meeting that demand is green deposits. These are interest-bearing bank deposits that enable a company to fund loans or commitments which meet established ESG criteria.

The idea behind green deposits is simple. Banks make loans that support ESG projects. Why not give companies an opportunity to fund those loans using their short-term cash?

Green deposits can help finance projects across a wide range of categories such as energy efficiency, renewable energy, clean transportation, waste management, greenhouse gas reduction, and sustainable agriculture and natural resource management. In doing so, they afford companies a simple, inexpensive opportunity to participate in the ESG movement.

REASONS TO CONSIDER THIS NEW DEPOSIT PRODUCT

There are many reasons why companies might want to allocate a portion of their short-term cash to green deposits. Among them:

- Green deposits are familiar. Corporate treasurers shouldn't expect many surprises with green deposits. They are a bank deposit product, just like the ones treasurers have used for years in both their business and personal financial lives. As such, they are easy to understand and familiar both to company decision makers and the frontline financial staff executing daily transactions.
- They carry low risk. Most traditional ESG investment alternatives expose corporate investors to the volatility and potential loss of principal associated with the securities markets. In contrast, green deposits offered by banks have the same characteristics of existing bank deposit products with additional protection from the Federal Deposit Insurance Corporation for FDIC insured institutions, with coverage up to applicable limits.

- They don't require a lot of resources to monitor. When was the last time you reviewed your savings account to see how it was performing? Bank deposit products just don't require a lot of monitoring, and thus there's no need to engage either internal or external investment managers to watch over them.

- There are few governance hurdles to clear. Because it's a new product, it's important to do a certain amount of due diligence before you begin making green deposits. You want to document how these deposits work and how they will help your company meet ESG goals. However, because it's such a familiar, low-risk product, there's usually no need to incorporate green deposits into formal investment policy guidelines.
- You get to tout your company's ESG practices. Say you're in an industry like oil exploration that's under the microscope from an ESG perspective. Wouldn't it be nice to report to shareholders and potential investors that a certain percentage of your short-term cash is in green deposits that support sustainable projects?
- Green deposits allow you to extend your relationship with your bank into the ESG arena. Rather than looking to a new, non-strategic relationship for support in pursuing ESG goals, you can integrate ESG into your day-to-day banking operations with a trusted partner and advisor.



BEFORE YOU 'GO GREEN' ON INVESTING

So how do you approach the decision on whether to dip the company's toes into green deposits—as well as other related matters such as who to invest with and how much to allocate?

The best advice is to follow the same "SLY" guiding principles you use for other short-term investment decisions—focusing on the "S" (security) first, then the "L" (liquidity), and finally on the "Y" (yield).

Green deposits offer a strong security profile. Most of the banks offering them today in the U.S. are large, well-capitalized global institutions, so counterparty risk shouldn't be an issue. Similarly, there is very little market price risk associated with a bank deposit product.

From a liquidity standpoint, green deposits can make sense for investing across all categories of short-term cash, including operational, core/reserve and strategic. The key is to select a deposit maturity that will ensure your company has access to cash when it's needed.

Under SLY, yield considerations come last, and that certainly should be the case with green deposits, where achieving ESG goals takes precedence over returns. In fact, the guiding principles for green deposit investing could be better described as "ESLY," with the "E" standing for "ESG."

ESG IS HERE TO STAY

The way ESG has weaved its way into the fabric of corporate decision making suggests it's not merely a trend. Being responsible stewards of corporate assets has become a fundamental part of corporate missions.

As companies continue to move forward on their ESG journeys, green deposits represent an inexpensive, low-risk way of engaging in socially responsible investing. For a corporate treasurer, it's a simple move—substituting green deposits for non-green deposits when allocating some portion of short-term cash.

To learn more, contact:



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TWO PATHS, ONE PURPOSE

The abiding relationship between a local successful roofing company and a heritage center for young people shows philanthropy working at its best.

Find the connection between the following:

1. A roofing company started by one young man 32 years ago that is now one of the largest in Orange County.
2. A deeply respected children's service organization that has been helping boys and girls find opportunities in life since 1941.

At first you wouldn't think the two had much in common, but at their fundamental core, they do. Antis Roofing of Irvine and Boys & Girls Club of Central Orange Coast are in the business of helping people in their communities who need it most. And nothing brought this common cause to the forefront more profoundly than the COVID-19 pandemic.

HARDSHIP AND HOPE

In his earliest days as an entrepreneur, Charles Antis visited a home that was badly in need of a new roof. When he stepped inside the house, the smell of mold was overwhelming. "I knew this family couldn't pay me and yet when I saw the hope in this young child's eyes, I knew I had to find a way to fix their roof," Antis says. He gathered his friends, called in some favors, and scraped together enough materials to put a new roof on the home.

This epiphany, he says, showed him two things: there was always a way to do the right thing, and also that putting purpose in front of profit was the only way he wanted to run his business.

The Founder & CEO of Antis Roofing & Waterproofing discovered that building a successful company isn't about getting, but about giving – even when it hurts – and to do the right thing for others. Word around the office is always "let's be better together" as he inspires not only his team but the staff and volunteers at numerous charitable organizations throughout Orange County and beyond, including the Boys & Girls Club of Central Orange Coast.

CREATING GREAT JOBS



Charles Antis joins Robert Santana at the groundbreaking for Costa Mesa's Club renovation

The recent pandemic put the futures of thousands of young people at stake and Robert Santana, CEO of Boys & Girls Club of Central Orange Coast, never wasted a minute by looking back – he jumped into action. "Our kids need us now more than ever," he says simply. Santana is known throughout the community for his excellence in entrepreneurship – intuitively able to quickly respond to the changing needs of the community.

Recognizing the impending labor shortage, Santana is focused on building a Workforce Development program. Both Antis and Santana understand the importance of providing alternative successful career paths. This program will support thousands of high school students in Orange County and ensure more equitable access to jobs and career opportunities through workshops, speaker series, internships, and trades training. The program is designed in partnership with local industry experts like Antis to deliver targeted information that puts students on a path to a living wage and then some – benefitting not only students, but also the local economy.

"We are excited about this program that champions the professional dreams and wellbeing of our young people," says Santana. The program highlights gainful employment opportunities, offers training courses and provides vital connections between students and employers.

As the program grows, its connections to Antis' purpose-driven mission becomes clearer. "The vision we share with Antis Roofing & Waterproofing," Santana explains, "is one in which every young person has access to the resources they need to create a sustainable career, regardless of what background, socio-economic status or obstacles they have."

PARTNERS FOR CAUSE

When two entities share a vision and a purpose, other connections follow. Audrey Schneider, Antis' Chief Financial Officer and a long-time proponent and participant in corporate philanthropy, noticed the great work that was going on between Antis and the Boys & Girls Club of Central Orange Coast. She got involved with the Boys & Girls Club Scholarship committee and most recently joined their Board of Directors.



Griffin Schneider, Jacob Schneider, Antis CFO Audrey Schneider, Antis Accounting Supervisor Chasity Kopeny, and Boys & Girls Club Director of Corporate Relations David Blair packing Thanksgiving food boxes for struggling families

"Our youth need resources to learn about the many innovative industries we have in our own backyard of Orange County," Schneider says. "I've always loved mentoring, volunteering and giving back, and I can't wait to do my best work with the Boys & Girls Club."

To learn more about the Boys & Girls Club's Workforce Development strategy and to help build a pathway to careers beyond high school, contact David Blair, Director of Corporate Relations at dblair@boysandgirlsclub.com

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Business law attorney Addison Adams is a full-service lawyer for businesses across all industries and acts as outside general counsel for many companies in Southern California.



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Developing Our Workforce Through Mentoring

Big Brothers Big Sisters helps community-minded companies build OC's future workforce while engaging employees and empowering youth

In Orange, Riverside and San Bernardino counties, more than 90,000 youth ages 16 to 24 are “disconnected”—defined as teens and young adults who are neither in school or working. More than 90,000 young people’s access to the institutions, communities and experiences that adequately prepare them for adulthood is alarmingly limited.

The youth that Big Brothers Big Sisters of Orange County and the Inland Empire supports—predominantly low-income students from communities of color—are most likely to be impacted by this threat of disconnection. They will face diminished earning potential and employment, which harms not only the individual but the entire community.

The World Bank recognizes mentoring and socio-emotional learning as core interventions for reengaging disconnected youth. For more than six decades, Big Brothers Big Sisters has created one-to-one mentoring relationships that ignite the power and promise of youth in Orange County. In this program, college and career readiness is a key focus to help youth navigate complex systems, develop a strong sense of self and belonging, and understand how to identify resources.

It’s a pillar that has attracted like-minded organizations interested in strengthening our local community and exposing the next generation to new pathways. In November 2020, the CEO Leadership Alliance Orange County (CLA-OC) funded a grant for Big Brothers Big Sisters to pair professionals from a variety of specialties at CHOC Children’s Hospital (CHOC) with students from Anaheim Union High School.

“CLA-OC is fundamentally principled on building vibrant communities through cross-sector

collaborations to create opportunities for all students and cultivate an early talent pipeline that is diverse and inclusive,” says Amy Kaufman, Vice President of Experiential Learning and Talent Development, CLA-OC. “We deeply value our partnership with Big Brothers Big Sisters; through their Workplace Mentoring Program, professionals and students are shepherded through the mentoring process empowering them to develop meaningful relationships in a relatively short period of time.”

While the program aims to put youth mentees on the path to career readiness, it also provides a double-impact for local businesses. With a commitment to corporate citizenship, Big Brothers Big Sisters partner companies can attract and retain socially conscious employees by providing innovative, engaging volunteer opportunities.

“The Workplace Mentoring Program allows our CHOC associates to give back by using their own diverse backgrounds and expertise to guide the next generation of workplace leaders,” says Mark E. Steiman, Executive Director, Human Resources, CHOC.

“Through this mentoring relationship, students are inspired to explore careers in healthcare and pursue opportunities that they may have once thought out of their reach. We are proud to partner with Big Brothers Big Sisters to do our part to build an empowered and diverse workforce in Orange County.

While this partnership is the start, it is clear the potential for more collaborative funding partnerships that invest back into our community and build our workforce through mentorship is accelerating. Stand with us—learn more about our partnerships at ocbigs.org/partners.



Mentoring channels a child’s potential into opportunity.
Join us — thousands of volunteers, partners and supporters — as we change trajectories for youth and strengthen the future workforce of Orange County.

LEARN MORE ABOUT THE
IMPACT OF MENTORING
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New Year, Higher Wage Costs

By: James J. McDonald, Jr., Fisher Phillips

While recent inflation has increased wage costs in many industries, further increases may occur in the new year in California as the result of increases in the minimum wage and various other wage rates that are tied to the minimum wage.

Effective January 1, 2022, the minimum wage for employers of 26 or more employees will increase to \$15.00 per hour. For employers of 25 or fewer employees it will increase to \$14.00 per hour. Some cities and counties in California have higher minimum wages but none of them is in Orange County.

The most significant wage increase for most businesses will be the higher minimum salary thresholds for the "white collar" overtime exemptions to apply. Employees who meet the duties tests for the executive, administrative and professional exemptions must also be paid a minimum salary in order to qualify for the exemption. In 2022, that minimum salary will be \$62,400 annually (twice the state minimum wage for a 40 hour week) for employers of 26 or more employees, and \$58,240 for employers of 25 or fewer employers. A review of the salaries of exempt employees should be undertaken to ensure that they still meet or exceed these minimums. If they do not, the employees will lose the exemption and they must be paid premium rates for any overtime worked.

The pay threshold for inside sales employees to be exempt from overtime will also increase with the minimum wage. Such employees must be paid more than one and one-half times the minimum wage for all hours worked and receive more than half of their compensation in the form of commissions in order to be exempt from overtime. The threshold in 2022 for the first part of the test will be \$22.51 per hour for employers of 26 or more employees, and \$21.01 per hour for employers of 25 or fewer employers. Note that this exemption only applies to inside salespersons in the manufacturing industry and in industries such as banks, colleges and universities, insurance companies, investment firms, legal and accounting offices, medical offices,

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non-profit organizations and private utility companies. It does not apply to employees in the hospitality, health care, retail, transportation, or amusement and recreation industries.

Minimum pay thresholds for overtime exemptions for other professionals will increase as well. The minimum hourly rate for the exemption covering high-level computer professionals will increase to \$50.00 per hour, \$8,679.16 monthly, and \$104,149.18 annually in 2022. The minimum hourly rate for hourly-paid licensed physicians and surgeons in California will increase to \$91.07 in the new year.

It is important to note that even though inside salespersons and high-level computer professionals may qualify for the overtime exemption in California, they are still covered by the state's meal and rest break requirements. The cost of providing an hour premium for a missed meal or rest break has increased as well, although as the result of a court decision earlier this year and not simply as the result of a new year. That court decision clarified that the hour's pay for a missed meal or rest break must be calculated the same as the "regular rate" for overtime. That is, all compensation received by the employee during the workweek must be included, not just the employee's hourly pay rate. For an inside sales employee paid substantial commissions, the commissions attributable to the workweek in which a meal or rest break was missed must be combined with the employee's hourly pay that week, then divided by the number of hours worked to get the rate at which the premium must be paid. It will be important to ensure that these employees receive compliant meal and rest breaks in order to avoid having to pay such expensive premiums.

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Making Dreams Attainable

Since 1975, MSI has been the leading supplier of flooring, countertop, wall tile, and hardscaping products in North America. Headquartered in Orange, California with over 30 state-of-the-art showroom and distribution centers, MSI directly supports over 250,000 jobs and affects over 1 million lives around the globe.

Family values are at the core of MSI's business and Making Dreams Attainable is fundamental to MSI's business and philanthropic endeavors. Whether it is dream surfaces for homeowners or the personal dreams of employees, customers, suppliers, MSI strives to be a strong community partner that protects and uplifts the lives and livelihoods of its extended family.

Through its philanthropic arm, MSI Charitable Trust, MSI focuses on Education Technology, Hunger, Health Care, and Employment Generation in Orange County, the USA, and around the globe. In 2021, MSI donated hundreds of thousands of dollars to Orange County charities and millions more across the world. This includes providing thousands of iPads and Laptops to Orange County families to help them transition to virtual learning during the Covid-19 pandemic. Nationally, MSI donated several thousand devices to over 20 school districts. To support our health care heroes, MSI donated hundreds of thousands of masks and PPE to local healthcare facilities and provided over 15,000 meals to frontline health workers in Orange County.

To support early childhood development, MSI donated to Pretend City – The Children's Museum in Irvine, partnered with Tustin Public Schools Foundation to provide student scholarships, and donated building materials to the Orangewood Foundation. MSI also partnered with My Private Professor to provide underserved school children with free K-12th Grade tutoring.

To serve our most vulnerable populations, MSI financially supported the United Cerebral Palsy of Orange County, built hundreds of homes through Habitat for Humanity, provided shelter, legal services and counseling to victims of domestic violence through its support of SAHARA Cares, and built kitchens around the world that serve 100,000 free meals every day to school children in impoverished areas.



Congratulations to the winners of the Companies That Care Award.

Giving is contagious. MSI is proud to give back to its local communities and hopes to inspire others to do the same.



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Our Corporate Partners Create Miracles

Miracles for Kids' corporate partners are more than just companies doing good, they are change-makers! They see a problem and are motivated to act. It is not enough to simply have the desire to do something good – intentions must be translated into action to become meaningful.

Our corporate partners, both large and small, are essential to the success of Miracles for Kids and preventing critically-ill children and families in crisis from falling through the cracks. Donating a percentage of sales from every hotel stay, including Miracles for Kids as an option for automatic payroll deductions, matching employee contributions, or donating \$250 for every home run hit by an Angels baseball player are just a few of the creative examples our corporate partners use to raise significant funds for our families.

Thank you to our 2021 Miracles for Kids Corporate Partners!

AAE Aerospace, Aliso Kids Dental & Orthodontics, Artemis Search Partners, Ashmore Construction, B Body Fitness, Champion Paving, David August, Javier's, Latham & Watkins LLP, Manna Kadar Beauty, McClain Cellars, Motiv-8, Nsight Psychology & Addiction, Orange County Breakers, Pacifica Foods, Perricone Farms, RedRock Technologies, Serve First Solutions, Smith Group Real Estate, Soul Community Planet, The Leeson Group, TRAFFIK, Truist, West Coast Aviation Services, and Xponential Fitness.

We make it easy for a company to establish a CSR program with us due to established programs that are designed to accommodate the participation and partnership of purpose-driven companies.

Upcoming Events

Kindness Box of Miracles – Love Box
January 26-29, 2022

Kindness Box of Miracles – Lucky Box
February 23-26, 2022

2022 Miracles for Kids Golf Invitational
March 28, 2022

Are you interested in becoming a Miracles for Kids corporate partner? Let's discuss how we can create miracles together for critically-ill children and families in need.



Our Corporate Partners Create Miracles!

Both large and small, our corporate partners are essential to the success of Miracles for Kids and helping critically-ill children and families. We are grateful to these companies and their employees for their generosity, enthusiasm, and commitment.

On behalf of those we serve, we extend our sincerest thanks. **Happy Holidays.**

Miracles for **KIDS**
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PDS

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visit the company’s dental clinic in Guatemala four times per year.

“Our hope is to be sustainable, not just fly in, do some work and fly out,” he said.

National Support Center

To encourage community aid, PDS offers its employees eight hours of paid volunteer participation in areas of their choice, including homeless shelters, food pantries and animal shelters.

“Maybe you spend three hours cutting onions at **Bracken’s Kitchen** to provide a meal for the homeless, but it means so much

more to see the impact you had on the lives of other people,” Guerin said. “Being in the HR or accounting side of the healthcare business, we don’t always see the impact of the patients. This opportunity to help others in a different way is always a great blessing for those who get to do it.”

Officials also organize monthly volunteer opportunities at the company’s **National Support Center** in Irvine, where quarterly blood drives and collection drives for non-profit partners are held. Over 125 Orange County-based employees have participated to date.

“There are a number of things that can be done, but it takes a dedicated clinician and team. Through that care, we allow people to become healthier and happier.” ■



PDS Foundation encourages clinic work in Guatemala

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Everett Dorey -
Giving Back To The Community

Since its inception in 2017, Everett Dorey has been committed to giving back to its community.

Firm partner, Samantha Dorey is on the Board of Directors of the Public Law Center, a pro bono law firm the provides access to justice for low income residents in Orange County. This year, the firm was proud to welcome Stacy Douglas to the firm as a Director of Diversity & Inclusion.

Stacy is dedicated to promoting Diversity, Equity, Inclusion and Belonging to the legal community, Fortune 500 companies and public entities.

Giving back to the community goes beyond the walls of the firm. During the pandemic, the firm initiated the First Responders First program that to support our first responders fighting in Orange County.



The Firm is also committed to achieving cultural diversity in the legal community. Firm partner-Diana Chao, is the firm’s representative of the Orange County Coalition for Diversity in Law (“OCCDL”). For 2021, the OCCDL has named Ms. Chao and firm Senior Counsel Jesse Maxwell as Top Young Diverse Lawyers, and the firm as a Top Legal Organization, for DEI in Orange County.

The firm supports numerous organizations that give back to the community such as the Orange County Lavender Bar Association that helps to connect the bar and advance LGBT equality, as well as the Veterans Legal Institute that provides pro bono legal assistance to at risk former service members.

The Firm’s efforts to make a positive impact on society and to give back to the community will remain a staple of the firm.

Seymour “Sy” Everett, III is a founding partner of Everett Dorey. Mr. Everett is a leading litigator in California and is routinely retained as trial counsel in complex and challenging cases throughout the state. Mr. Everett is an elected member of the American Board of Trial Advocates (“ABOTA”), a highly respected national advocacy group dedicated to the preservation of the right to trial by jury. He is also recognized as a “Super Lawyer”, which is an exclusive list, recognizing no more than 5% of the attorneys in the state.

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