

PRIVATE FOUNDATIONS

Rank	Foundation	Website	Total giving	Year End	Assets	Largest donations/beneficiaries	Areas of interest	Types of giving	Top local official(s)
Prev. Rank	Address	E-mail	OC giving					Geographic area of giving	Title Phone/fax
1 (1)	Marisla Foundation 668 N. Coast Highway, PMB 1400 Laguna Beach 92651-1513	fsrequests.com/marisla glenda@marisla.org	\$46.5 million n/a	12/14	\$55.5 million	Resources Legacy Fund, Oceana, Crystal Cove Alliance, Global Greengrants Fund, Orange County Community Foundation	Marine/ocean conservation and environmental toxic health issues on both a domestic and international level; women's issues in Orange County and Los Angeles County	Grants n/a	Herbert Bedolfe executive director (949) 494-0365
2 (2)	Arnold and Mabel Beckman Foundation 100 Academy Drive Irvine 92617-3002	beckman-foundation.org admin@beckman-foundation.org	\$27.3 million \$464,895	8/15	\$562.7 million	California Institute of Technology, Chemical Heritage Foundation, City of Hope, Cornell University, Stanford University, University of Illinois Urbana-Champaign	Science, education, research	Grants national	Anne Hultgren executive director (949) 721-2222/(949) 721-2225
3 (3)	William and Sue Gross Family Foundation P.O. Box 15014 Albany 12212-5014	grossfamilyfoundation@gmail.com	\$18.7 million \$3.3 million	12/14	\$383.2 million	Ayco Charitable Foundation, Cedars-Sinai Medical Center, Mission Hospital, Millennium Villages Project, Doctors Without Borders	Health, economically disadvantaged individuals	Grants national	Sue Gross president
4 (4)	Argyros Family Foundation 949 S. Coast Drive, Ste. 600 Costa Mesa 92626-7734		\$18.5 million \$13.4 million	7/14	\$138.8 million	Chapman University, CHOC Children's Foundation, UCI Foundation, Discovery Science Center, Orangewood Children's Foundation, City of Hope, St. Andrews Presbyterian Church	Education, arts, healthcare/medical, religious organizations	Grants national	Julianne Argyros CEO/president/director (714) 481-5000
5 (26)	Donald Bren Foundation P.O. Box 3090 Newport Beach 92658-3090	donald-bren.com	\$15.2 million \$0	11/15	\$126.5 million	California Institute of Technology, Los Angeles County Museum of Art, Mirman School for Gifted Children, Marine Corps Scholarship Foundation	Education, conservation and research	Grants California	Donald Bren chairman/director/president (949) 720-3400
6 (32)	Opus Foundation 10474 Santa Monica Blvd., Ste. 200 Los Angeles 90025-6930		\$9.8 million \$9.7 million	12/14	\$5 million	UCI Foundation, Pacific Symphony, South Coast Repertory, St. Margaret's Episcopal School, Dartmouth College	Education, arts, children and youth	Grants national	Stacey Nicholas president/director
7 (5)	Simon Foundation for Education and Housing 620 Newport Center Drive, 12th floor Newport Beach 92660-8012	simonfamilyfoundation.net	\$6.1 million \$4.5 million	12/15	\$7.8 million	Simon Scholars Program	Education and housing	Scholarships national	Ronald M. Simon/Kathy Simon Abels/Gary Singer founder/executive director, Simon Family Foundation/chairman (949) 270-3652/(949) 720-1164
8 (8)	Crean Foundation P.O. Box 8449 Newport Beach 92658-8449		\$3.5 million \$2.9 million	12/14	\$72.7 million	Chapman University, Children's Bureau, Children's Hospital of Orange County, Hoag Hospital Foundation, Army and Navy Academy	Education, health, hospitals, medical research, war veterans, at-risk youth, religious programs, economically disadvantaged people	Grants national	Andrew Crean/Marc Goldin president/CFO (949) 642-3050
9 (9)	A. Gary Anderson Family Foundation 17772 Cowan Irvine 92614-6012		\$3.3 million n/a	12/14	\$73.4 million	n/a	Education, human services, arts	Grants n/a	Erin Lastinger/Erik Anderson co-chairman, CEO/co-chairman, president (949) 242-5050
10 (7)	Swenson Family Foundation 34372 Cove Lantern Dana Point 92629-2870		\$3.2 million \$375,000	12/14	\$56.1 million	Children's Hospital of Orange County, Ocean Institute, California Lutheran University, University of Minnesota Duluth, University of Wisconsin Foundation	Education, religious organizations, hospitals	Grants national	James Swenson president (949) 493-0266
11 (11)	Henry T. Nicholas III Foundation 15 Enterprise, Ste. 550 Aliso Viejo 92656-2656	htnfoundation.org info@htnfoundation.org	\$2.8 million \$2.8 million	12/14	\$13.8 million	Boys & Girls Club of the South Coast Area, Henry T. Nicholas Educational Foundation, National Crime Victim Law Institute	Victim's rights, education, youth sports, technology, medical research, national defense	Grants national	Henry T. Nicholas III trustee (949) 448-4480
12 (10)	Ueberroth Family Foundation P.O. Box 37 Corona del Mar 92625-0037	ueberroth.org info@ueberroth.org	\$2.7 million \$2.4 million	12/14	\$40.4 million	Orange County Community Foundation, Boys & Girls Clubs of Santa Ana, El Sol Science & Arts Academy of Santa Ana, Girl's Inc., KidWorks, MIND Research Institute, Think Together	Youth, education, health, human services	Grants national	Vicki Booth president
13 (NR)	Ahmanson Charitable Community Trust P.O. Box 19599 Irvine 92623-9599		\$2.5 million \$521,447	12/14	\$104,957	Center for Early African Christianity, Pacific Symphony, Cornerstone University, Music Center, Orange County Rescue Mission	Religious education, public welfare, education	Grants national	Howard F. Ahmanson Jr./Roberta G. Ahmanson trustees (949) 474-1965
14 (12)	Dhont Family Foundation 2700 N. Main St., Ste. 1100 Santa Ana 92705-6680		\$1.9 million \$1.6 million	12/14	\$40.8 million	Chapman University, Second Harvest Food Bank of Orange County, Orangewood Children's Foundation, Cal State Fullerton Philanthropic Foundation, Giving Children Hope, USC Norris Comprehensive Cancer Center	Child welfare, education, human services, youth, hospital care	Grants national	Andre Dhont president (714) 664-0440
15 (38)	B. John Garrick Foundation for the Advancement of the Risk Sciences 221 Crescent Bay Drive Laguna Beach 92651-1322	garrickfoundation.org info@garrickfoundation.org	\$1.7 million \$0	9/15	\$140,263	UCLA Foundation	Research, development, and application of technology	Grants Southern California	B. John Garrick president/director (949) 497-6802
16 (15)	James L. Stamps Foundation Inc. 600 N. Tustin Ave., Ste. 260 Santa Ana 92705-3782		\$1.5 million \$309,383	12/14	\$30.7 million	Calvary Church of Santa Ana, Vanguard University, Richfield Community Church, Azusa Pacific University, Point Loma Nazarene University, Biola University, Westmont College	Religious charities, education	Grants national	Richard Salyer president (714) 568-9740
17 (22)	Beall Family Foundation 1200 Newport Center Drive, Ste. 220 Newport Beach 92660-0933		\$1.4 million \$989,284	12/14	\$13 million	St. Margaret's Episcopal School, UCI Foundation, Segerstrom Center for the Arts, Orange County Museum of Art, University of Pittsburgh Office of Institutional Advancement, Naval Postgraduate School Foundation Inc., San Jose State University	Education, arts, healthcare/medical	Grants national	Donald Beall chairman (949) 718-6333
18 (13)	Paul & Elisabeth Merage Family Foundation 660 Newport Center Drive, Ste. 1300 Newport Beach 92660-6492		\$1.4 million \$1.4 million	12/14	\$37.3 million	UCI Foundation, Orange County Community Foundation, Merage Institute, University Synagogue	Research, education, human services	Grants international	Paul Merage president/director (949) 474-5800
19 (17)	Kay Family Foundation 16381 Scientific Way, Ste. 812 Irvine 92618-4354	kayff.org	\$1.3 million \$1.2 million	12/14	\$35 million	Chapman University, Orangewood Children's Foundation, UC Regents, UCI Foundation, OneOC	Education, religious organizations	Grants international	Steeve Kay chairman/director (949) 379-2300
20 (14)	Croul Family Foundation 18101 Von Karman Ave., Ste. 700 Irvine 92612-0145	croulffoundation.org grants@croulffoundation.org	\$1.3 million \$913,500	12/14	\$24.9 million	Claremont McKenna College, Mind Research Institute, High School Inc. Foundation, Literacy Project Foundation, Second Harvest Food Bank, UCI Foundation	Education, food banks, shelters, human services	Grants national	Spencer Behr Croul secretary (877) 968-6328/(949) 833-9584
21 (16)	Change A Life Foundation 5 Corporate Park, Ste. 210 Irvine 92606-5166	changealife.org info@changealife.org	\$1.2 million n/a	12/14	\$299,212	Ava's Heart, LifeSTEPS, National Multiple Sclerosis Society, Community Senior Services	Human services, education, medical services, disabilities, family self-sufficiency, crisis intervention	Grants n/a	Lisa Fujimoto executive VP (949) 788-9999/(949) 788-9266

Source: Foundation Center, GuideStar, and the foundations. Abbreviations: n/a: not available
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Researched by Dana Truong & Alyssa Matsuhara

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PRIVATE FOUNDATIONS

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Rank Prev. Rank	Foundation •Address	•Website •E-mail	Total giving OC giving	Year End	Assets	Largest donations/beneficiaries	Areas of interest	Types of giving •Geographic area of giving	Top local official(s) •Title •Phone/fax
22 (24)	George E. Hewitt Foundation for Medical Research 1048 Irvine Ave., Ste. 742 Newport Beach 92660-4602		\$921,691 \$339,709	12/14	\$35.2 million	Individual grants	Medical research	Grants Southern California	Dennis Cunningham president (714) 840-9819
23 (20)	George T. Pflieger Foundation 2549 Eastbluff Drive, Ste. 481 Newport Beach 92660-3500		\$909,945 \$155,391	12/13	\$17.2 million	Orange County School of the Arts, Huntington Medical Research Institutes (HMRI) Liver Center, Fristers, Rancho Santa Fe Foundation, Giving it Back to Kids	Youth, human services, education, healthcare	Grants national	Thomas Pflieger president/trustee
24 (19)	Hal and Jeanette Segerstrom Family Foundation 818 W. Bay Ave. Newport Beach 92661-1110		\$625,000 \$625,000	12/14	\$6.6 million	Pacific Symphony Orchestra	Performing arts	Grants Southern California	Theodore Segerstrom president (949) 675-3490
25 (23)	David & Julianna Pyott Foundation P.O. Box 50520 Irvine 92619-0520		\$624,545 \$36,700	12/14	\$1.2 million	American Friends of London Business School, Chapman University, Fogarty Institute for Innovation, International Council of Ophthalmology, KOCE-TV	Education, healthcare, medical research, blindness and vision loss	Grants international	David Pyott president (949) 388-8691
26 (25)	Optivest Foundation 24901 Dana Point Harbor, Ste. 230 Dana Point 92629	optivestfoundation.org info@optivestfoundation.org	\$607,345 \$305,572	12/14	\$16,013	Coast Hills Church, Convenc, Forest Home Foundation, Hope International, Northrise University, Operation Mobilization, Crossline Community Church	Christian-based organizations	Grants international	Mark Van Mourick/Trish Van Mourick CEO, Optivest Wealth Management/executive director, Optivest Foundation
27 (21)	Samueli Foundation 2101 E. Coast Highway, Ste. 300 Corona del Mar 92625-1941	samueli.org info@samueli.org	\$586,440 \$275,090	12/14	\$225,252	UCLA Foundation, UCI Foundation, Anaheim Ducks Foundation, Jewish Federation & Family of OC, Planet Care/Global Health Access Program	Education, health, social services, religious organizations, arts	Grants national	Gerald Solomon executive director (949) 760-4400/(949) 759-5707
28 (6)	Tiger Woods Foundation 121 Innovation, Ste. 150 Irvine 92617-3093	tigerwoodsfoundation.org	\$562,426 n/a	9/14	\$108 million	Tiger Woods Learning Centers, Earl Woods Scholarships, other youth serving entities	Educator professional development, college access and success, STEM workforce development programs for underserved communities	Grants national	Rick Singer CEO/president (949) 725-3003/(949) 725-3002
29 (18)	Joan Irvine Smith & Athalie R. Clarke Foundation 18881 Von Karman Ave. Irvine 92612-1500		\$531,500 \$531,500	4/15	\$5.3 million	The Irvine Museum, UCI Foundation, National Water Research Institute, Mission San Juan Capistrano	Conservation, environment, arts, education	Grants Southern California	Joan Irvine Smith president/director (949) 476-8400
30 (28)	William Gillespie Foundation 4910 Campus Drive Newport Beach 92660-2119		\$438,150 n/a	12/14	\$4.4 million	Sage Hill School, Friendship Shelter, Families Forward, Pacific Chorale, UCI Foundation, Second Harvest Food Bank	Arts and culture, child welfare, diseases and conditions, education, human services, performing arts	Grants n/a	William Gillespie president
31 (27)	James E. Downey Foundation 1729 Apollo Court Seal Beach 90740-5617		\$421,800 \$70,800	6/15	\$3.7 million	Individual scholarships	Education	Scholarships national	James E. Downey president (562) 344-1700
32 (30)	Eichenberg-Larson Charitable Foundation 1 Collins Island Newport Beach 92662-1003		\$360,000 \$220,000	9/14	\$6.6 million	UCI Institute for Memory Impairments and Neurological Disorders, American Red Cross, Brigham Young University, West Point Fund, LDS Philanthropies	Arts, education, healthcare, medical research	Grants national	LaDorna Eichenberg/Jorli Perine directors (949) 852-9433
33 (31)	Tsao Family Foundation P.O. Box 1115 Corona del Mar 92625-1115		\$350,800 n/a	12/14	\$9.6 million	Teach for China, Irvine Canaan Christian Community Church, Project Hope Alliance, Paws'itive Teams, Renewal Foundation	Education, human services, religion	Grants n/a	Michael Liyoung Tsao president
34 (34)	The Keith and Judy Swayne Family Foundation 668 N. Coast Highway, Ste. 251 Laguna Beach 92651-1513	swaynefoundation.org	\$350,500 \$228,000	12/14	\$7.8 million	Orange County Community Foundation, OC Human Relations, Boys & Girls Club of Santa Ana, Human Options, Laura's House, Child Guidance Center	Social justice, youth development, education, environmental practices, health and well-being of women in need	Grants international	Anne Swayne Keir president (949) 910-2727
35 (33)	Frome Family Foundation 151 Kalmus Drive, Ste. F-2 Costa Mesa 92626-5965		\$301,550 \$272,250	12/15	\$5.6 million	Special Olympics OC, Hoag Hospital, CHOC, Casa Teresa, Goodwill OC, Mater Dei High School	Social services, medical research, education	Grants Southern California	Stan Frome president (714) 641-1130
36 (29)	Mark Chapin Johnson Foundation P.O. Box 3088 Mission Viejo 92690-1088		\$239,290 \$87,010	12/14	\$6.2 million	Claremont University, Chapman University, Hoover Institution, Boys Hope Girls Hope of California	Education, arts, children and youth	Grants national	Mark Chapin Johnson CEO/president (714) 305-8360
37 (35)	Charles D. & Twyla R. Martin Foundation 21 Smithcliffs Road Laguna Beach 92651-1325		\$211,390 \$160,865	12/14	\$458,540	UC Irvine, Chapman University, Segerstrom Center for the Arts, Orange County Museum of Art, University of Texas Foundation	Arts and culture, education, human services	Grants national	Twyla R. Martin president (949) 494-7728
38 (36)	Sheldon Razin Family Foundation 1695 Viking Road Laguna Beach 92651-3246		\$120,180 \$45,180	10/15	\$329,818	America-Israel Cultural Foundation, Chabad Jewish Center of Laguna Beach	Arts and culture, religion, education	Grants national	Sheldon Razin chairman/president/director (949) 497-6707
39 (40)	Don P. Nichols Foundation 12 N. Vista De Catalina Laguna Beach 92651-6755		\$89,800 \$23,000	12/14	\$612,583	Laguna Beach High School Scholarship, Pomona Unified School District, Pacific Ridge School; California State University, Long Beach	Education	Scholarships California	Donald P. Nichols director (714) 313-1900
40 (37)	Cameron Merage Foundation 108 Pacifica, Ste. 300 Irvine 92618-7435		\$85,967 \$100	12/14	\$1.7 million	Impact Assets, Hadassa, Friends of the Israel Defense Forces	Jewish community, financial services	Grants national	Cameron Merage president (714) 557-0771
41 (39)	Haggerty Family Foundation 620 Newport Center Drive Newport Beach 92660-6420		\$46,705 n/a	12/15	\$1.4 million	St. Mary's Catholic Church, The Lourdes Foundation, Egyptian Theater, University of St. Thomas	Religion, youth development, healthcare	Grants n/a	Charles Haggerty president (949) 706-7300
42 (41)	Andrei Olenicoff Memorial Foundation 7 Corporate Plaza Drive Newport Beach 92660-7904	andreifoundation.com andreifoundation@olenproperties.com	\$42,150 \$5,000	12/14	\$154,739	Guide Dogs for the Blind, American Cancer Society, Foundation for Fighting Blindness, Orange County Makapo Aquatics Project; Jewish Federation & Family Services, Orange County	Vision impairment, eye blindness	Grants national	Igor Olenicoff president (949) 719-7256

Source: Foundation Center, GuideStar, and the foundations. Abbreviations: n/a: not available
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Researched by Dana Truong & Alyssa Matsuhara

Private Foundations Boost Overall Giving By 23%

Combine to Donate \$180M, Increase Local Gifts 46%

■ By MICHAEL DE LOS REYES

Orange County's private foundations gave more locally and overall in their most recent fiscal years.

Those on this week's Business Journal list gave a little more than \$180 million overall in their most recent fiscal years, up about 23%, according to data compiled by the Business Journal. They contributed \$50 million to OC programs, a 46% increase.

The Business Journal ranks the largest individual and family foundations based on the most

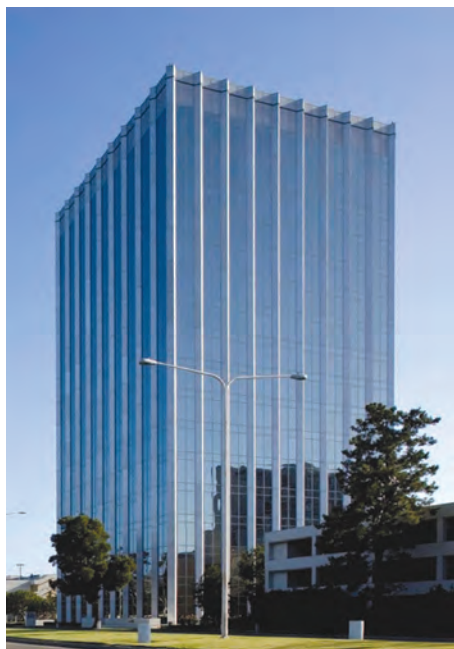
recent data on total cash contributions.

The figures are based on recent tax figures and foundation reports, though the organizations have different fiscal years.

Thirty of the 42 foundations increased contributions in the past fiscal year, and 12 donated less money. One foundation joined the list, and two broke into the top 10.

About 75% of the \$33.8 million increase in total giving came from three foundations: the **Donald Bren Foundation** in Newport Beach, the **Opus Foundation** in Los Angeles, and the **Ahmanson Charitable Community Trust** in Irvine.

About 80% of the \$15 million increase in OC giving came from two foundations: the **William and Sue Gross Family Foundation** in Albany, N.Y., and the **Opus Foundation**.



620 Newport Center: holds headquarters of **Simon Foundation for Education and Housing, No. 7 on the list**

■ The **Marisla Foundation** in Laguna Beach easily held on to the top spot with about \$46.5 million in total contributions, up about 1% and almost twice the contributions of the No. 2 foundation. Oil heiress **Ann Getty Earhart** is president of the foundation, which supports environmental issues.

The Business Journal couldn't determine its OC contributions because no recipient cities were listed in its Form 990, the Internal Revenue Service tax form that provides information about a nonprofit. The foundation had about \$55.5 million in assets, up about 12%.

■ The **Arnold and Mabel Beckman Foundation** in Irvine is ranked No. 2 with about

\$27.3 million in total contributions, up about 10%. The foundation gave 56% less money locally compared to the prior year, or about \$465,000. Its assets dropped 8% to about \$562.7 million. **Arnold Beckman** founded Fullerton-based **Beckman Instruments Inc.**, now **Beckman Coulter Inc.** in Brea.

■ The **William and Sue Gross Family Foundation** ranks No. 3 with about \$18.7 million in contributions, a 3% increase. It appears to have moved its headquarters to an East Coast post-office box within the past year.

The foundation's local contributions increased more than 1,000% to over \$3.3 million, not including \$40 million that the couple it's named for gave to the **University of California-Irvine** in January for the creation of a nursing school. Bond fund manager **Bill Gross** co-founded Newport Beach-based **Pacific Investment Management Co.** and now is with Denver-based **Janus Capital Group's** Newport Beach office.

Such "mega gifts" have occurred less frequently this year, said **Shelly Hoss**, president of the **Orange County Community Foundation**, which matches donors and charities (see related story on page 1). Many nonprofit groups rely on mega-gifts to launch capital campaigns or to support ongoing programs.

■ The **Argyros Family Foundation** in Costa Mesa is No. 4 with about \$18.5 million, up 38%. It contributed about \$13.4 million in OC, up 14%, and had about \$139 million in assets, a 16% increase. **George Argyros**, who founded the organization, owns Costa Mesa real estate developer **Arnel & Affiliates**.

■ The **Donald Bren Foundation** leaped from No. 26 last year to No. 5 with \$15.2 million in total contributions, up 2,562%. The foundation gave no money to local organizations last year, according to its recent Form 990. Its assets fell

8% to about \$126.5 million.

Notable

■ It took the position held last year by the **Simon Foundation for Education and Housing** in Newport Beach, which ranked No. 7 and increased contributions 22% to about \$6.1 million. The Simon foundation doubled its local giving to about \$4.5 million and increased assets by about 1,800% to \$7.8 million.

■ The **Opus Foundation** jumped from the No. 32 spot last year to No. 6 with \$9.8 million in contributions, up 3,400%. Almost all of that went to OC causes, likely because of its ties with **Stacey Nicholas**, ex-wife of **Broadcom Corp.** co-founder **Henry Nicholas**. The \$9.7 million in OC contributions was up 3,590%. Its assets dropped 64% to about \$5 million.

■ **Opus** took the rank held last year by the **Tiger Woods Foundation** in Irvine, which dropped to No. 28 with about \$562,000 in total contributions, down 87%, the biggest decline in donations on the list. The foundation was ranked No. 27 two years ago when it reported \$467,190. It doesn't list benefitting cities on its Form 990. The foundation had about \$108 million in assets, up about 1%.

■ The **Ahmanson Charitable Community Trust** was the newcomer to the list at No. 13 with about \$2.5 million in total contributions, up 154%. It increased its OC giving by 9% to \$521,447 while its assets almost doubled to about \$105,000. **Home Savings** bank founder **Howard Ahmanson** created the foundation to support the arts and humanities.

■ The **B. John Garrick Foundation for the Advancement of the Risk Sciences** in Laguna Beach, at No. 15, is the last notable foundation this year. Its total contributions increased 2,750% to \$1.7 million. It gave no money to local programs, and its assets fell by 93% to \$140,000. ■