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Private Foundations Give More in OC, Less Overall

Combined to Donate \$145M, Increased OC Giving 22.8%
KATE SCHWARTZ

Monday, September 7, 2015

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Private foundations based in Orange County spent more money in their own backyard last year as they trimmed their overall giving.

The foundations on this week's Business Journal list gave just over \$145 million overall, 6.3% less than the \$155 million they donated in 2013, according to data compiled by the Business Journal. Orange County charities still saw added benefit as the listed foundations' local giving increased 22.8% from \$34.6 million to \$42.4 million. That followed a 9.3% drop in local giving in 2013.

The Business Journal ranks the county's 41 largest individual and family foundations based on the most recent available data charting cash contributions. Most numbers are based on tax figures and foundation reports, and organizations have fiscal years that are different from each other.

Total cash contributions dropped last year, though 25 of the foundations reported an increase—some of them significant.

Only two of the top 10 private foundations reported a notable decrease in total contributions.

- Irvine-based Tiger Woods Foundation reported an 812% increase in total cash contributions from \$467,190 in fiscal year 2012 to nearly \$4.3 million in 2013. It jumped from No. 27 to No. 6 on the list—the biggest change this year by a large margin.
- The Aliso Viejo-based Henry T. Nicholas Foundation, No. 11 also reported a significant increase in charitable contributions, up nearly 60% to \$2.4 million in total contributions, nearly that entire amount going to Orange County charities.

The foundation was called the Henry T. and Stacey Nicholas Foundation until the couple's 2006 separation, when it adopted its current name and Stacey Nicholas established her own foundation—the Opus Foundation in Irvine.

- Opus Foundation dropped from No. 24 to 32 this year due to a 55% decrease in total contributions for the fiscal year ending December 2013.

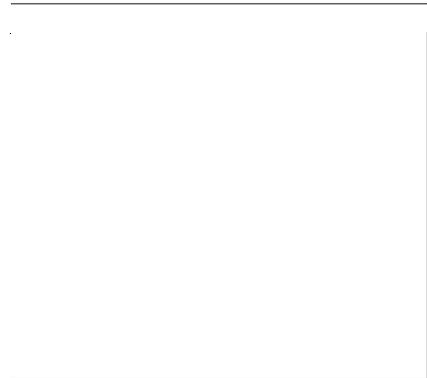
It made all of its \$279,000 in contributions to Orange County charities, including to Costa Mesa-based Junior Achievement of Orange County, Santa Ana-based The Wooden Floor, and Santa Ana-based Women Helping Women Inc.

The Business Journal reported a \$9.5 million gift by the foundation to the Henry Samueli School of Engineering at University of California-Irvine in June 2014.

- The Costa Mesa-based Argyros Foundation stayed at No. 4 this year, reporting a 27% increase to \$13.4 million in total cash contributions and \$11.8 million in contributions in Orange County. The local figure represented a 127% increase.

Its main project has been a \$13.5 million donation given to the Segerstrom Center for the Arts in support of helping rebuild the center's central plaza in Costa Mesa, according to a representative of the foundation. The spot will be named the Julianne and George Argyros Plaza and is expected to be finished in the fall of 2016.

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- Dana Point-based Optivest Foundation is the only newcomer to the list. It made \$604,058 in total contributions last year, with \$302,497 of that given to Orange County charities. Optivest is ranked No. 25. It was founded in 2007 and is funded by 10% of the gross revenue of Optivest Inc., Optivest Properties LLC, and Optivest Investment Banking, according to the foundation's website. It has invested more than \$2.3 million in local and international areas since 2007.

Trish Van Mourick, who founded the Optivest Foundation with her husband, Mark, said the rise in contributions can be attributed to the Optivest companies' increased profitability in recent years. The foundation donates mostly internationally, with some local giving, and to Christian-based causes.

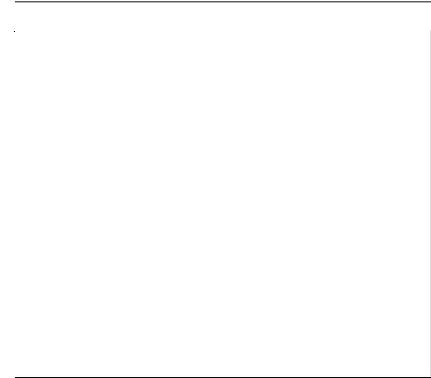
"We have multiyear projects in Rwanda, Zambia, and India, and focus on projects that will be sustainable in the future," Van Mourick said. "We are passionate about international projects because we really see our investment dollars go so much further."

One of the current projects listed on the foundation's website is the Freedom Climb, an annual event when women from around the world climb Mount Kilimanjaro to "raise global awareness, prayers, and funds for women and children who are oppressed, enslaved, exploited, and trafficked throughout the world."

- The Newport Beach-based Donald Bren Foundation reported a 73% decrease in contributions and a 93% decrease in Orange County contributions—it gave one \$100,000 gift to Santa-Ana based nonprofit Think Together. The foundation dropped from No. 10 to No. 26. It meanwhile increased its total assets by almost 20% to nearly \$137.5 million. The foundation is one of Bren's numerous philanthropic outlets. His Irvine Company donated 2,500 acres of open space near Orange and Anaheim Hills last year on land that had been approved for 5,500 homes.

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PRIVATE FOUNDATIONS

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
1 (1)	Marisla Foundation 668 N. Coast Highway, PMB 1400 Laguna Beach 92651-1513	fsrequests.com/marisla glenda@marisla.org	\$45 million \$5.6 million	12/14	n/a	Resources Legacy Fund	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 international	Herbert Bedolfe executive director (949) 494-0365/(949) 494-8392
2 (3)	Arnold and Mabel Beckman Foundation 100 Academy Drive Irvine 92617-3002	beckman-foundation.org admin@beckman-foundation.org	\$24.8 million \$1.1 million	8/14	\$613.8 million	California Institute of Technology, City of Hope, Stanford University, University of Illinois Urbana-Champaign	Science, education, research	Grants national	Jacqueline Dorrance executive director (949) 721-2222/(949) 721-2225
3 (2)	William and Sue Gross Family Foundation 17900 Von Karman Ave., Ste. 200 Irvine 92614-4297	grossfamilyfoundation@gmail.com	\$18.8 million \$3.2 million	12/14	\$387.4 million	Mercy Ships, Cedars-Sinai, Millennium Village Project, Charles Drew University	Health and science	Grants national	Sue Gross president
4 (4)	Argyros Foundation 949 S. Coast Drive, Ste. 600 Costa Mesa 92626-7734		\$13.4 million \$11.8 million	7/13	\$119.8 million	Chapman University, CHOC Children's Foundation, Sage Hill School, UCI Foundation	Education, arts, healthcare, religious organizations	Grants national	George Argyros CEO (714) 481-5000
5 (5)	Simon Foundation for Education and Housing 620 Newport Center Drive, 12th floor Newport Beach 92660-8012	simonscholars.org info@simonscholars.org	\$5 million \$2.2 million	6/15	n/a	Simon Scholars Program	Education and housing	Scholarships national	Ronald M. Simon/Kathy Simon Abels/Gary Singer founder/executive director, Simc Family Foundation/chairman (949) 270-3652/(949) 720-1164
6 (27)	Tiger Woods Foundation 121 Innovation, Ste. 150 Irvine 92617-3093	tigerwoodsfoundation.org	\$4.3 million n/a	9/13	\$107.1 million	Individual donations/scholarships	Youth, education, STEM, college scholarships, community support	Grants national	Rick Singer CEO/president (949) 725-3003/(949) 725-3002
7 (6)	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
8 (7)	Crean Foundation P.O. Box 8449 Newport Beach 92658-8449		\$3.2 million \$2.7 million	12/13	\$73.2 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	Grants national	Andrew Crean/Marc Goldin president/CFO (949) 642-3050
9 (8)	A. Gary Anderson Family Foundation 17772 Cowan Irvine 92614-6012		\$2.9 million n/a	12/13	\$71.4 million	Servite High School, Kinship Center, Institute for Shipboard Education, City of Hope, Children's Fund, Chapman University Athletic Complex, Big Brothers Big Sisters	Child welfare, education, health, education, hospital care, human services	Grants n/a	Erin Lastinger/Erik Anderson co-chairman, CEO/co-chairman, president (949) 242-5050
10 (9)	Ueberroth Family Foundation P.O. Box 37 Corona del Mar 92625-0037	ueberroth.org info@ueberroth.org	\$2.5 million \$2.2 million	12/13	\$41.2 million	Human Options, El Sol Science & Arts Academy of Santa Ana, Girl's Inc., KidWorks, MIND Research Institute, Think Together	Education, research, hospital care, human services, youth	Grants national	Vicki Booth president



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11 (14)	Henry T. Nicholas III Foundation 15 Enterprise, Ste. 550 Aliso Viejo 92656-2656	htnfdoundation.org info@htnfdoundation.org	\$2.4 million \$2.4 million	12/13	\$10.5 million	Henry T. Nicholas Educational Foundation, UCI Foundation, St. Margaret's Episcopal School	Victim's rights, education, youth sports, technology, medical research, national defense	Grants national	Henry T. Nicholas III trustee (949) 448-4480
12 (12)	Dhont Family Foundation 2700 N. Main St., Ste. 1100 Santa Ana 92705-6680		\$1.8 million \$1.5 million	12/13	\$41.6 million	Chapman University, Second Harvest Food Bank of Orange County, Orangewood Children's Foundation, Serve the People, Cal State Fullerton Philanthropic Foundation, Giving Children Hope	Education, human services, research, children	Grants national	Andre Dhont president (714) 664-0440
13 (13)	Paul & Elisabeth Merage Family Foundation 660 Newport Center Drive, Ste. 1300 Newport Beach 92660-6492		\$1.6 million \$1.5 million	12/13	\$34.9 million	UCI Foundation, Merage Jewish Community Center of Orange County, University Synagogue, St. Margaret's Episcopal School	Research, education, human services	Grants California	Paul Merage president/director (949) 474-5800
14 (16)	Croul Family Foundation 18101 Von Karman Ave., Ste. 700 Irvine 92612-0145	croulfdoundation.org grants@ croulfdoundation.org	\$1.6 million \$878,500	12/13	\$23.8 million	Claremont McKenna College Foundation, Mind Research Institute, Orange Catholic Foundation, High School Inc. Foundation, Literacy Project Foundation, Second Harvest Food Bank, St. John's Hospital Foundation	Education, food banks, shelters, human services	Grants national	Spencer Behr Croul secretary (877) 968-6328/(949) 833-9584
15 (15)	James L. Stamps Foundation Inc. 600 N. Tustin Ave., Ste. 260 Santa Ana 92705-3782		\$1.5 million \$264,836	12/13	\$30.9 million	Calvary Church of Santa Ana, Campus Crusade for Christ, Urban Youth Workers Institute, Vanguard University, Richfield Community Church	Religious charities, education	Grants national	Richard Salyer president (714) 568-9740
16 (11)	Change A Life Foundation 5 Corporate Park, Ste. 210 Irvine 92606-5166	changealife.org info@changealife.org	\$1.4 million n/a	12/13	\$233,094	Southern California Rehabilitation Services, UC Berkeley, UCLA, Partners in Care Foundation, LifeSTEPS, Community Senior Services	Human services, education, underprivileged families, at-risk youth	Grants n/a	Lisa Fujimoto executive VP (949) 788-9999/(949) 788-9266
17 (19)	Kay Family Foundation 16381 Scientific Way, Ste. 812 Irvine 92618-4354	kayff.org info@kayff.org	\$1.3 million \$1.2 million	12/13	\$32.5 million	Chapman University, Orangewood Children's Foundation, UC Regents, UCI Foundation, Xelots Inc.	Education, religious organizations	Grants international	Steeve Kay chairman/director (949) 379-2300
18 (17)	Joan Irvine Smith & Athalie R. Clarke Foundation 18881 Von Karman Ave., Ste. 1275 Irvine 92612-1500		\$1.2 million \$1.2 million	4/14	\$5.6 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
19 (18)	Hal and Jeanette Segerstrom Family Foundation 818 W. Bay Ave. Newport Beach 92661-1110		\$1 million \$1 million	12/13	\$6 million	Pacific Symphony Orchestra, Festival Ballet Theatre	Arts, education	Grants Southern California	Theodore Segerstrom president (949) 675-3490
20 ...	George T. Pflieger Foundation 2549 Eastbluff Drive, Ste. 481		\$909,945 \$155,391	12/13	\$17.2 million	Orange County School of the Arts, Huntington Medical Research Institutes (HMRI) Liver Center, Fristers,	Youth, human services, education, healthcare	Grants national	Thomas Pflieger president/trustee

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
21 (22)	Samueli Foundation 2101 E. Coast Highway, Ste. 300 Corona del Mar 92625-1941	samueli.org info@samueli.org	\$882,004 \$589,104	12/13	\$179,956	UCLA Foundation, UCI Foundation, Project Dignity, National Academy of Engineering, Chapman University	Education, human services, religious organizations, health, performing arts	Grants national	Gerald Solomon executive director (949) 760-4300/(949) 759-5707
22 (20)	Beall Family Foundation 1200 Newport Center Drive, Ste. 220 Newport Beach 92660-0933		\$803,682 \$381,300	12/13	\$13.4 million	St. Margaret's Episcopal School, UCI Foundation, The Wooden Floor, Segerstrom Center for the Arts, Orange County Museum of Art, Hoover Institution, University of Pittsburgh Office of Institutional Advancement	Education, arts	Grants national	Donald Beall chairman (949) 718-6333
23 (25)	David & Julianna Pyott Foundation P.O. Box 50520 Irvine 92619-0520		\$746,930 \$37,200	12/13	\$1.9 million	American Friends of London Business School, Orange County United Way, CHOC Children's Foundation, Boy Scouts of America Orange County Council, Masterpiece Trust	Education, children, healthcare, blindness and vision loss	Grants international	David Pyott president (949) 388-8691
24 (23)	George E. Hewitt Foundation for Medical Research 1048 Irvine Ave., Ste. 742 Newport Beach 92660-4602		\$739,444 \$318,719	12/13	\$34 million	Individual medical research grants	Healthcare, science	Grants California	Dennis Cunningham president (714) 840-9819
25 (NR)	Optivest Foundation 24901 Dana Point Harbor, Ste. 230 Dana Point 92629	optivestfoundation.org info@optivestfoundation.org	\$604,058 \$302,497	12/14	n/a	Coast Hills Community Church, Crossline Community Church, Convenc, Forest Home, Hope International, Northrise University, Operation Mobilization	Christian-based organizations	Grants international	Mark Van Mourick/Trish Van Mourick CEO, Optivest Wealth Management/director of Optives Foundation
26 (10)	Donald Bren Foundation P.O. Box 3090 Newport Beach 92658-3090	donald-bren.com	\$570,000 \$100,000	11/14	\$137.5 million	Public Policy Institute of California, Think Together, Los Angeles County Museum of Art, Caltech, Mirman School	Education, arts, public policy	Grants national	Donald Bren chairman/director/president (949) 720-3400
27 (28)	James E. Downey Foundation 23 Brookline Aliso Viejo 92656-1461		\$401,700 \$70,200	6/14	\$4.1 million	Individual scholarships	Education	Scholarships national	James E. Downey president (949) 474-0900
28 (26)	William Gillespie Foundation 359 San Miguel Drive, Ste. 209 Newport Beach 92660-7808		\$384,100 n/a	12/13	\$2.3 million	Sage Hill School, Court Appointed Special Advocates, Orange County Rescue Mission, Friendship Shelter, Families Forward, Irvine Barclay Theatre, Pacific Chorale	Arts and culture, child welfare, diseases and conditions, education, human services, performing arts	Grants n/a	William Gillespie president
29 (29)	Mark Chapin Johnson Foundation P.O. Box 3008 Mission Viejo 92690-1088		\$309,127 \$181,737	12/13	\$6.4 million	Claremont Graduate University, Chapman University, Segerstrom Center for the Arts	Education, arts	Grants national	Mark Chapin Johnson CEO/president (714) 305-8360
30 (30)	Eichenberg-Larson Charitable Foundation 1 Collins Island Newport Beach 92662-1003		\$300,000 \$170,000	9/13	\$6.5 million	UCI Institute for Memory Impairments and Neurological Disorders, Mozart Classical Orchestra, Segerstrom Center for the Arts, American Cancer Society	Arts, education, healthcare	Grants national	Robert Eichenberg director (949) 852-9433
31 (33)	Tsao Family Foundation P.O. Box 1115 Corona del Mar 92625-1115		\$299,440 \$66,430	12/13	\$8 million	Teach for China, Irvine Canaan Christian Community Church, UC Irvine, Project Hope Alliance, Paws'itive Teams, Illinois Institute of Technology, Renewal Foundation	Education, human services, religion	Grants national	Michael Liyoung Tsao president (949) 706-3355
32 (24)	Opus Foundation 10474 Santa Monica Blvd., Ste. 200 Los Angeles 90025		\$279,000 \$279,000	12/13	\$14.3 million	Pacific Symphony, South Coast Repertory, St. Margaret's Episcopal School, Star Rock Ministries, Cradle to Career, Kenya	Education, arts	Grants Southern California	Stacey Nicholas president/director
33 (31)	Frome Family Foundation 151 Kalmus Drive, Ste. F-2 Costa Mesa 92626-5965		\$261,250 \$238,250	12/14	\$6.1 million	Special Olympics OC, Hoag Hospital, CHOC, Casa Teresa, Goodwill OC, Mater Dei High School	Social services and education	Grants Southern California	Stan Frome president (714) 641-1130
34 (32)	The Keith and Judy Swayne Family Foundation 668 N. Coast Highway, Ste. 251 Laguna Beach 92651-1513	swaynefoundation.org	\$245,000 \$160,000	12/13	\$6.6 million	Boys & Girls Club of Santa Ana, Human Options, KidWorks Community Development Corp., Orange County Congregation Community Organization, Laura's House	Social justice, youth development, education, environmental practices, health and well-being of women in need	Grants international	Anne Swayne Keir president/director (949) 910-2727
35 (34)	Charles D. & Twyla R. Martin Foundation 21 Smithcliffs Road Laguna Beach 92651-1325		\$194,475 \$193,475	12/13	\$625,545	UC Irvine, Chapman University, Segerstrom Center for the Arts, Orange County Museum of Art	Arts and culture, education, human services	Grants national	Twyla R. Martin president (949) 494-7728
36 (35)	Sheldon Razin Family Foundation 1695 Viking Road Laguna Beach 92651-3246		\$125,100 \$40,100	10/14	\$466,527	America-Israel Cultural Foundation, Chabad Jewish Center of Laguna Beach, MIT Hillel	Housing development, human services, religion, education	Grants national	Sheldon Razin chairman/president/director (949) 497-6707
37 (37)	Cameron Merage Foundation 108 Pacifica, Ste. 300 Irvine 92618-7435		\$83,159 \$3,539	12/13	\$1.8 million	First in Our Hearts Foundation, Friends of Schneider Children's Medical Center of Israel, Chabad Jewish Center of Laguna Beach, Second Harvest Food Bank of Orange County	Human services, children, Jewish community	Grants international	Cameron Merage president (714) 557-0771
38 (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	\$60,000 \$0	9/14	\$1.9 million	UCLA Foundation	Education, science, research	Grants Southern California	B. John Garrick president/director (949) 497-6802
39 (39)	Haggerty Family Foundation 620 Newport Beach Center Drive Newport Beach 92677-5434		\$51,575 n/a	12/14	\$1.6 million	St. Mary's Catholic Church, The Lourdes Foundation, Egyptian Theater, University of St. Thomas	Arts and culture, religion, youth development, healthcare	Grants n/a	Charles Haggerty president (949) 706-7300
40 (36)	Don P. Nichols Foundation 12 N. Vista De Catalina Laguna Beach 92651-6755		\$50,540 \$12,000	12/13	\$699,080	Laguna Beach High School Scholarship, Pomona Unified School District, Pacific Ridge School; California State University, Long Beach	Education	Scholarships California	Donald Nichols director (714) 313-1900