FOR PUBLIC DISCLOSURE

EXTENDED TO NOVEMBER 15, 2017

Form **990-PF**

Department of the Treasury
Internal Revenue Service

# Return of Private Foundation

**or Section 4947(a)(1) Trust Treated as Private Foundation**

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No. 1545-0052

**2016**

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation: EVELYN AND WALTER HAAS, JR. FUND

A Employer identification number: 94-6068932

Number and street (or P.O. box number if mail is not delivered to street address): 114 SANSOME STREET — Room/suite: 600

B Telephone number: (415) 856-1400

City or town, state or province, country, and ZIP or foreign postal code: SAN FRANCISCO, CA 94104

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 459,305,570.

J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

| | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|---|---|---|---|
| Revenue | 1 Contributions, gifts, grants, etc., received | | | N/A | |
| | 2 Check ▶ ☒ if the foundation is not required to attach Sch. B | | | | |
| | 3 Interest on savings and temporary cash investments | | | | |
| | 4 Dividends and interest from securities | 8,188,142. | 10,141,253. | | STATEMENT 1 |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | 18,670,920. | | | |
| | b Gross sales price for all assets on line 6a 18,670,920. | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 16,006,558. | | |
| | 8 Net short-term capital gain | | | | |
| | 9 Income modifications | | | | |
| | 10a Gross sales less returns and allowances | | | | |
| | b Less: Cost of goods sold | | | | |
| | c Gross profit or (loss) | | | | |
| | 11 Other income | 23,681. | -12,345,871. | | STATEMENT 2 |
| | 12 **Total.** Add lines 1 through 11 | 26,882,743. | 13,801,940. | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc. | 657,500. | 65,750. | | 591,750. |
| | 14 Other employee salaries and wages | 3,147,645. | 258,122. | | 2,889,523. |
| | 15 Pension plans, employee benefits | 1,470,182. | 87,226. | | 1,382,956. |
| | 16a Legal fees STMT 3 | 44,712. | 22,356. | | 22,356. |
| | b Accounting fees STMT 4 | 113,597. | 72,526. | | 41,071. |
| | c Other professional fees STMT 5 | 103,040. | 19,642. | | 83,398. |
| | 17 Interest | 8,373. | 0. | | 8,373. |
| | 18 Taxes STMT 6 | 151,732. | 558,763. | | 0. |
| | 19 Depreciation and depletion | 293,781. | 0. | | |
| | 20 Occupancy | 530,411. | 0. | | 530,411. |
| | 21 Travel, conferences, and meetings | 183,686. | 0. | | 183,686. |
| | 22 Printing and publications | 7,385. | 0. | | 7,385. |
| | 23 Other expenses STMT 7 | 946,907. | 0. | | 946,907. |
| | 24 **Total operating and administrative expenses.** Add lines 13 through 23 | 7,658,951. | 1,084,385. | | 6,687,816. |
| | 25 Contributions, gifts, grants paid | 30,185,864. | | | 23,371,500. |
| | 26 **Total expenses and disbursements.** Add lines 24 and 25 | 37,844,815. | 1,084,385. | | 30,059,316. |
| | 27 Subtract line 26 from line 12: | | | | |
| | a Excess of revenue over expenses and disbursements | -10,962,072. | | | |
| | b **Net investment income** (if negative, enter -0-) | | 12,717,555. | | |
| | c **Adjusted net income** (if negative, enter -0-) | | | N/A | |

# FOR PUBLIC DISCLOSURE

Form **8868**
(Rev. January 2017)
Department of the Treasury
Internal Revenue Service

## Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**
▶ **Information about Form 8868 and its instructions is at** *www.irs.gov/form8868*.

OMB No. 1545-1709

**Electronic filing** *(e-file).* You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile*, click on Charities & Non-Profits, and click on *e-file* for *Charities and Non-Profits.*

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Enter filer's identifying number**

**Type or print**

File by the due date for filing your return. See instructions.

Name of exempt organization or other filer, see instructions.
EVELYN AND WALTER HAAS, JR. FUND

Employer identification number (EIN) or
94-6068932

Number, street, and room or suite no. If a P.O. box, see instructions.
114 SANSOME STREET, NO. 600

Social security number (SSN)

City, town or post office, state, and ZIP code. For a foreign address, see instructions.
SAN FRANCISCO, CA 94104

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 4

| Application Is For | Return Code | Application Is For | Return Code |
|---|---|---|---|
| Form 990 or Form 990-EZ | 01 | Form 990-T (corporation) | 07 |
| Form 990-BL | 02 | Form 1041-A | 08 |
| Form 4720 (individual) | 03 | Form 4720 (other than individual) | 09 |
| Form 990-PF | 04 | Form 5227 | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | 12 |

- The books are in the care of ▶ MONICA PRESSLEY 114 SANSOME STREET, STE 600 - SAN FRANCISCO, CA 94104
  Telephone No. ▶ (415) 856-1400 Fax No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ ☐. If it is for part of the group, check this box ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until NOVEMBER 15, 2017, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☒ calendar year 2016 or
▶ ☐ tax year beginning ______, and ending ______.

**2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

| | | | |
|---|---|---|---|
| **3a** | If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. | 3a | $ 827,046. |
| **b** | If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | 3b | $ 727,046. |
| **c** | **Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | 3c | $ 100,000. |

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.** Form **8868** (Rev. 1-2017)

623841 01-11-17

# FOR PUBLIC DISCLOSURE



**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only.

| | | Beginning of year | End of year | |
|---|---|---|---|---|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash - non-interest-bearing | 1,289,145. | 187,810. | 187,810. |
| | 2 Savings and temporary cash investments | 84,244. | | |
| | 3 Accounts receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 4 Pledges receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons | | | |
| | 7 Other notes and loans receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | 239,464. | 362,387. | 362,387. |
| | 10a Investments - U.S. and state government obligations | | | |
| | b Investments - corporate stock STMT 8 | 26,960,539. | 22,691,551. | 22,691,551. |
| | c Investments - corporate bonds | | | |
| | 11 Investments - land, buildings, and equipment: basis ▶ | | | |
| | Less: accumulated depreciation ▶ | | | |
| | 12 Investments - mortgage loans | | | |
| | 13 Investments - other STMT 9 | 434,006,630. | 434,980,160. | 434,980,160. |
| | 14 Land, buildings, and equipment: basis ▶ 3,450,559. | | | |
| | Less: accumulated depreciation ▶ 2,366,897. | 1,205,808. | 1,083,662. | 1,083,662. |
| | 15 Other assets (describe ▶ ) | | | |
| | 16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I) | 463,785,830. | 459,305,570. | 459,305,570. |
| Liabilities | 17 Accounts payable and accrued expenses | 1,731,178. | 1,865,341. | |
| | 18 Grants payable | 6,163,926. | 12,978,290. | |
| | 19 Deferred revenue | | | |
| | 20 Loans from officers, directors, trustees, and other disqualified persons | | | |
| | 21 Mortgages and other notes payable | | | |
| | 22 Other liabilities (describe ▶ STATEMENT 10) | 1,136,919. | 670,204. | |
| | 23 **Total liabilities** (add lines 17 through 22) | 9,032,023. | 15,513,835. | |
| Net Assets or Fund Balances | **Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.** | | | |
| | 24 Unrestricted | 454,753,807. | 443,791,735. | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | **Foundations that do not follow SFAS 117, check here** ▶ [ ] **and complete lines 27 through 31.** | | | |
| | 27 Capital stock, trust principal, or current funds | | | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | | | |
| | 30 **Total net assets or fund balances** | 454,753,807. | 443,791,735. | |
| | 31 **Total liabilities and net assets/fund balances** | 463,785,830. | 459,305,570. | |

**Part III Analysis of Changes in Net Assets or Fund Balances**

| | | | |
|---|---|---|---|
| 1 | Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) | 1 | 454,753,807. |
| 2 | Enter amount from Part I, line 27a | 2 | -10,962,072. |
| 3 | Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 | Add lines 1, 2, and 3 | 4 | 443,791,735. |
| 5 | Decreases not included in line 2 (itemize) ▶ | 5 | 0. |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | 6 | 443,791,735. |

# FOR PUBLIC DISCLOSURE



## Part IV Capital Gains and Losses for Tax on Investment Income

| | (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|---|---|---|---|---|
| 1a | FROM PARTNERSHIPS | P | | |
| b | | | | |
| c | | | | |
| d | | | | |
| e | | | | |

| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|---|
| a | 18,670,920. | | 2,664,362. | 16,006,558. |
| b | | | | |
| c | | | | |
| d | | | | |
| e | | | | |

| | Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|---|---|---|---|---|
| | (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| a | | | | 16,006,558. |
| b | | | | |
| c | | | | |
| d | | | | |
| e | | | | |

| | | | |
|---|---|---|---|
| 2 Capital gain net income or (net capital loss) | { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } | 2 | 16,006,558. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 | | 3 | N/A |

## Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|---|---|---|---|
| 2015 | 35,219,203. | 477,932,896. | .073691 |
| 2014 | 33,690,414. | 478,092,906. | .070468 |
| 2013 | 34,456,796. | 456,253,937. | .075521 |
| 2012 | 28,472,457. | 446,567,412. | .063758 |
| 2011 | 33,563,801. | 468,404,391. | .071656 |

| | | |
|---|---|---|
| 2 **Total** of line 1, column (d) | 2 | .355094 |
| 3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | 3 | .071019 |
| 4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 | 4 | 444,371,073. |
| 5 Multiply line 4 by line 3 | 5 | 31,558,789. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 127,176. |
| 7 Add lines 5 and 6 | 7 | 31,685,965. |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 30,231,653. |

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

## Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

| | | | | | |
|---|---|---|---|---|---|
| 1a | Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions) | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b | | | 1 | 254,351. |
| c | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). | | | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | | 2 | 0. |
| 3 | Add lines 1 and 2 | | | 3 | 254,351. |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | | 4 | 0. |
| 5 | **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0- | | | 5 | 254,351. |
| 6 | Credits/Payments: | | | | |
| a | 2016 estimated tax payments and 2015 overpayment credited to 2016 | 6a | 727,046. | | |
| b | Exempt foreign organizations - tax withheld at source | 6b | | | |
| c | Tax paid with application for extension of time to file (Form 8868) | 6c | 100,000. | | |
| d | Backup withholding erroneously withheld | 6d | | | |
| 7 | Total credits and payments. Add lines 6a through 6d | | | 7 | 827,046. |
| 8 | Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached | | | 8 | |
| 9 | **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶ | | | 9 | |
| 10 | **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶ | | | 10 | 572,695. |
| 11 | Enter the amount of line 10 to be: **Credited to 2017 estimated tax** ▶ | | 150,000. **Refunded** ▶ | 11 | 422,695. |

## Part VII-A Statements Regarding Activities

| | | | Yes | No |
|---|---|---|---|---|
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | 1a | | X |
| b | Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? | 1b | | X |
| | *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.* | | | |
| c | Did the foundation file **Form 1120-POL** for this year? | 1c | | X |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0. | | | |
| e | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0. | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | 2 | | X |
| | *If "Yes," attach a detailed description of the activities.* | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes* | 3 | | X |
| 4a | Did the foundation have unrelated business gross income of $1,000 or more during the year? | 4a | X | |
| b | If "Yes," has it filed a tax return on **Form 990-T** for this year? | 4b | X | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | 5 | | X |
| | *If "Yes," attach the statement required by General Instruction T.* | | | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | 6 | X | |
| 7 | Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV* | 7 | X | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA | | | |
| b | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation* | 8b | X | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV* | 9 | | X |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | 10 | | X |

## Part VII-A Statements Regarding Activities *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) | 11 | | X |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) | 12 | X | |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | X | |

Website address ▶ WWW.HAASJR.ORG

14 The books are in care of ▶ THE ORGANIZATION Telephone no. ▶ (415) 856-1400
Located at ▶ 114 SANSOME STREET, STE 600, SAN FRANCISCO, CA ZIP+4 ▶ 94104

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 | N/A

| | | | Yes | No |
|---|---|---|---|---|
| 16 | At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? | 16 | | X |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶ | | | |

## Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

| | | | | Yes | No |
|---|---|---|---|---|---|
| 1a | During the year did the foundation (either directly or indirectly): | | | | |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | ☐ Yes ☒ No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | ☐ Yes ☒ No | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | ☐ Yes ☒ No | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | ☒ Yes ☐ No | | | |
| | (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? | ☐ Yes ☒ No | | | |
| | (6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) | ☐ Yes ☒ No | | | |
| b | If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | | 1b | | X |
| | Organizations relying on a current notice regarding disaster assistance check here ▶ ☐ | | | | |
| c | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? | | 1c | | X |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): | | | | |
| a | At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? | ☐ Yes ☒ No | | | |
| | If "Yes," list the years ▶ ______, ______, ______, ______ | | | | |
| b | Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) | N/A | 2b | | |
| c | If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______ | | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | ☐ Yes ☒ No | | | |
| b | If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)* | N/A | 3b | | |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a | | X |
| b | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016? | | 4b | | X |

## Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **5b** No: X

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? SEE STATEMENT 11 ☒ Yes ☐ No

*If "Yes," attach the statement required by Regulations section 53.4945-5(d).*

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

*If "Yes" to 6b, file Form 8870.*

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

## Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

**1 List all officers, directors, trustees, foundation managers and their compensation.**

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---|
| IRA S. HIRSCHFIELD<br>114 SANSOME STREET, SUITE 600<br>SAN FRANCISCO, CA 94104 | PRESIDENT<br>40.00 | 657,500. | 162,455. | 15,572. |
| WALTER J. HAAS<br>114 SANSOME STREET, SUITE 600<br>SAN FRANCISCO, CA 94104 | CHAIR<br>8.00 | 0. | 0. | 0. |
| ELIZABETH H. EISENHARDT<br>114 SANSOME STREET, SUITE 600<br>SAN FRANCISCO, CA 94104 | SECRETARY<br>2.00 | 0. | 0. | 0. |
| ROBERT D. HAAS<br>114 SANSOME STREET, SUITE 600<br>SAN FRANCISCO, CA 94104 | TREASURER<br>2.00 | 0. | 0. | 0. |

**2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."**

| (a) Name and address of each employee paid more than $50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---|
| SYLVIA YEE - 114 SANSOME STREET,<br>SUITE 600, SAN FRANCISCO, CA 94104 | VP PROGRAMS<br>40.00 | 346,443. | 83,622. | 0. |
| MICHAEL BLAKE - 114 SANSOME STREET,<br>SUITE 600, SAN FRANCISCO, CA 94104 | VP FINANCE<br>40.00 | 271,515. | 76,828. | 0. |
| MATT FOREMAN - 114 SANSOME STREET,<br>SUITE 600, SAN FRANCISCO, CA 94104 | PROGRAM DIRECTOR<br>40.00 | 232,400. | 66,196. | 0. |
| JENNIE WATSON - 114 SANSOME STREET,<br>SUITE 600, SAN FRANCISCO, CA 94104 | VP SPECIAL INITIATIVES<br>32.00 | 224,200. | 60,264. | 0. |
| LINDA WOOD - 114 SANSOME STREET,<br>SUITE 600, SAN FRANCISCO, CA 94104 | PROGRAM DIRECTOR<br>40.00 | 179,100. | 53,620. | 0. |

**Total** number of other employees paid over $50,000 ▶ 18

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

| (a) Name and address of each person paid more than $50,000 | (b) Type of service | (c) Compensation |
|---|---|---|
| RUSSELL REYNOLDS ASSOCIATES<br>P.O. BOX 6427, NEW YORK, NY 10249 | PROFESSIONAL SERVICES | 164,660. |
| LANGTECH SYSTEMS CONSULTING - 733 FRONT STREET, SUITE 110, SAN FRANCISCO, CA 94111 | CONSULTANT | 144,158. |
| WILLIAM H. WOODWELL<br>1292 JADWYN RD, MAURERTOWN, VA 22644 | CONSULTANT | 95,855. |
| DELOITTE TAX LLP<br>P.O. BOX 844736, DALLAS, TX 75284 | PROFESSIONAL SERVICES | 54,375. |
| | | |
| **Total** number of others receiving over $50,000 for professional services ▶ | | 0 |

**Part IX-A Summary of Direct Charitable Activities**

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|---|---|
| 1 SEE STATEMENT 12 | 864,432. |
| 2 | |
| 3 | |
| 4 | |

**Part IX-B Summary of Program-Related Investments**

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. | Amount |
|---|---|
| 1 N/A | |
| 2 | |
| All other program-related investments. See instructions. | |
| 3 | |
| **Total.** Add lines 1 through 3 ▶ | 0. |

## Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

| | | | | |
|---|---|---|---|---|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | | |
| a | Average monthly fair market value of securities | | 1a | 448,152,830. |
| b | Average of monthly cash balances | | 1b | 2,985,315. |
| c | Fair market value of all other assets | | 1c | |
| d | **Total** (add lines 1a, b, and c) | | 1d | 451,138,145. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e 0. | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | | 2 | 0. |
| 3 | Subtract line 2 from line 1d | | 3 | 451,138,145. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | | 4 | 6,767,072. |
| 5 | **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4 | | 5 | 444,371,073. |
| 6 | **Minimum investment return.** Enter 5% of line 5 | | 6 | 22,218,554. |

## Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

| | | | | |
|---|---|---|---|---|
| 1 | Minimum investment return from Part X, line 6 | | 1 | 22,218,554. |
| 2a | Tax on investment income for 2016 from Part VI, line 5 | 2a 254,351. | | |
| b | Income tax for 2016. (This does not include the tax from Part VI.) | 2b 10,644. | | |
| c | Add lines 2a and 2b | | 2c | 264,995. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | | 3 | 21,953,559. |
| 4 | Recoveries of amounts treated as qualifying distributions | | 4 | 0. |
| 5 | Add lines 3 and 4 | | 5 | 21,953,559. |
| 6 | Deduction from distributable amount (see instructions) | | 6 | 0. |
| 7 | **Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | | 7 | 21,953,559. |

## Part XII Qualifying Distributions (see instructions)

| | | | |
|---|---|---|---|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| a | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 | 1a | 30,059,316. |
| b | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | 172,337. |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | **Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 30,231,653. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | 5 | 0. |
| 6 | **Adjusted qualifying distributions.** Subtract line 5 from line 4 | 6 | 30,231,653. |

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

## Part XIII Undistributed Income (see instructions)

| | | (a) Corpus | (b) Years prior to 2015 | (c) 2015 | (d) 2016 |
|---|---|---|---|---|---|
| 1 Distributable amount for 2016 from Part XI, line 7 | | | | | 21,953,559. |
| 2 Undistributed income, if any, as of the end of 2016: | | | | | |
| a Enter amount for 2015 only | | | | 0. | |
| b Total for prior years: ___ , ___ , ___ | | | 0. | | |
| 3 Excess distributions carryover, if any, to 2016: | | | | | |
| a From 2011 | 10,618,478. | | | | |
| b From 2012 | 6,237,906. | | | | |
| c From 2013 | 13,114,553. | | | | |
| d From 2014 | 10,410,386. | | | | |
| e From 2015 | 11,918,200. | | | | |
| f **Total** of lines 3a through e | | 52,299,523. | | | |
| 4 Qualifying distributions for 2016 from Part XII, line 4: ▶ $ 30,231,653. | | | | | |
| a Applied to 2015, but not more than line 2a | | | | 0. | |
| b Applied to undistributed income of prior years (Election required - see instructions) | | | 0. | | |
| c Treated as distributions out of corpus (Election required - see instructions) | | 0. | | | |
| d Applied to 2016 distributable amount | | | | | 21,953,559. |
| e Remaining amount distributed out of corpus | | 8,278,094. | | | |
| 5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).) | | 0. | | | 0. |
| 6 **Enter the net total of each column as indicated below:** | | | | | |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 | | 60,577,617. | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | 0. | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | | 0. | | |
| e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr. | | | | 0. | |
| f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017 | | | | | 0. |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) | | 0. | | | |
| 8 Excess distributions carryover from 2011 not applied on line 5 or line 7 | | 10,618,478. | | | |
| 9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a | | 49,959,139. | | | |
| 10 Analysis of line 9: | | | | | |
| a Excess from 2012 | 6,237,906. | | | | |
| b Excess from 2013 | 13,114,553. | | | | |
| c Excess from 2014 | 10,410,386. | | | | |
| d Excess from 2015 | 11,918,200. | | | | |
| e Excess from 2016 | 8,278,094. | | | | |

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

| | Tax year | Prior 3 years | | | |
|---|---|---|---|---|---|
| | **(a)** 2016 | **(b)** 2015 | **(c)** 2014 | **(d)** 2013 | **(e) Total** |
| 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, line 4 for each year listed | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | |
| e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | |
| c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from an exempt organization | | | | | |
| (4) Gross investment income | | | | | |

**Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)**

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

SEE STATEMENT 13

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| **a** *Paid during the year* | | | | |
| **Total** SEE CONTINUATION SHEET(S) ▶ **3a** | | | | 23,371,500. |
| **b** *Approved for future payment* | | | | |
| **Total** SEE CONTINUATION SHEET(S) ▶ **3b** | | | | 11,838,725. |

## Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelated business income | | Excluded by section 512, 513, or 514 | | (e) Related or exempt function income |
|---|---|---|---|---|---|
| | (a) Business code | (b) Amount | (c) Exclusion code | (d) Amount | |
| 1 Program service revenue: | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash investments | | | | | |
| 4 Dividends and interest from securities | | | 14 | 8,188,142. | |
| 5 Net rental income or (loss) from real estate: | | | | | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal property | | | | | |
| 7 Other investment income | | | 18 | 23,681. | |
| 8 Gain or (loss) from sales of assets other than inventory | | | 18 | 18,670,920. | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue: | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 26,882,743. | 0. |

**13 Total.** Add line 12, columns (b), (d), and (e) ........ 13 26,882,743.

(See worksheet in line 13 instructions to verify calculations.)

## Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

| Line No. ▼ | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). |
|---|---|

# FOR PUBLIC DISCLOSURE



**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | | |
| | (1) Cash | 1a(1) | | X |
| | (2) Other assets | 1a(2) | | X |
| b | Other transactions: | | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| | (4) Reimbursement arrangements | 1b(4) | | X |
| | (5) Loans or loan guarantees | 1b(5) | | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

| (a) Line no. | (b) Amount involved | (c) Name of noncharitable exempt organization | (d) Description of transfers, transactions, and sharing arrangements |
|---|---|---|---|
| | | N/A | |

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|---|---|---|
| N/A | | |

**Sign Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee | Date | PRESIDENT Title

May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No

**Paid Preparer Use Only**

| Print/Type preparer's name | Preparer's signature | Date | Check ☐ if self- employed | PTIN |
|---|---|---|---|---|
| JOAN S. MCMAHON | Joan McMahon | 11/10/17 | | P00966494 |

Firm's name ▶ DELOITTE TAX LLP — Firm's EIN ▶ 86-1065772

Firm's address ▶ 555 MISSION STREET SAN FRANCISCO, CA 94105 — Phone no. (415) 783-4000

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| A SAFE PLACE<br>P.O. BOX 23006<br>OAKLAND, CA 94623 | | PC | TO PROVIDE EMERGENCY SHELTER TO SURVIVORS OF DOMESTIC VIOLENCE IN OAKLAND. 10,000 OVER TWO YEARS (2015-2017). | 5,000. |
| ABODE SERVICES<br>40849 FREMONT BOULEVARD<br>FREMONT, CA 94538 | | PC | FOR THE SUNRISE VILLAGE EMERGENCY SHELTER TO PROVIDE HOUSING TO HOMELESS INDIVIDUALS AND FAMILIES IN FREMONT, NEWARK, UNION CITY AND HAYWARD. $25,000 OVER TWO YEARS (2016-2018). | 12,500. |
| ACLU FOUNDATION OF NORTHERN CALIFORNIA<br>39 DRUMM STREET<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. | 300. |
| ACLU FOUNDATION OF SOUTHERN CALIFORNIA<br>1313 WEST EIGHTH STREET<br>LOS ANGELES, CA 90017-0000 | | PC | TO SUPPORT THE ALUMNI OF THE FELLOWSHIP FOR A NEW CALIFORNIA TO BUILD LEADERSHIP AND COMMON GROUND. $100,000 OVER 18 MONTHS (2015-2017). | 48,000. |
| ACLU FOUNDATION OF SOUTHERN CALIFORNIA<br>1313 WEST EIGHTH STREET<br>LOS ANGELES, CA 90017-0000 | | PC | TO PROTECT THE LEGAL RIGHTS OF IMMIGRANTS IN ORANGE COUNTY AND THE INLAND EMPIRE. $25,000. | 25,000. |
| AIM HIGH FOR HIGH SCHOOL<br>P.O. BOX 410715<br>SAN FRANCISCO, CA 94141 | | PC | FOR ITS 30TH ANNIVERSARY GALA. $1,000 | 1,000. |
| ALAMEDA COUNTY COMMUNITY FOOD BANK<br>P.O. BOX 2599<br>OAKLAND, CA 94614 | | PC | TO DISTRIBUTE NUTRITIOUS FOOD TO CHILDREN, ADULTS AND SENIORS STRUGGLING WITH FOOD-INSECURITY IN ALAMEDA COUNTY. $80,000 OVER TWO YEARS (2015-2017) | 40,000. |
| | | | | |
| **Total from continuation sheets** | | | | 23,371,500. |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| ALAMEDA EMERGENCY FOOD<br>P.O. BOX 2167<br>ALAMEDA, CA 94501-0214 | | PC | TO SUPPORT A FOOD DISTRIBUTION CENTER FOR LOW-INCOME RESIDENTS IN THE CITY OF ALAMEDA. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| ALAMEDA FAMILY SERVICES<br>2325 CLEMENT AVENUE, SUITE A<br>ALAMEDA, CA 94501 | | PC | FOR THE DREAMCATCHER EMERGENCY YOUTH SHELTER TO PROVIDE EMERGENCY SHELTER AND NIGHTLY MEALS FOR HOMELESS YOUTH IN ALAMEDA COUNTY. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| ALLIED MEDIA PROJECTS<br>4126 THIRD STREET<br>DETROIT, MI 48201 | | PC | FOR THE 18MILLIONRISING.ORG PROJECT TO CONDUCT ONLINE ADVOCACY AND ORGANIZING IN ASIAN AMERICAN COMMUNITIES. $125,000 OVER 18 MONTHS | 125,000. |
| AMERICAN CIVIL LIBERTIES UNION FOUNDATION OF NORTHERN CALIFORNIA<br>39 DRUMM STREET<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| AMERICAN CIVIL LIBERTIES UNION FOUNDATION, INC.<br>125 BROAD STREET, 18TH FLOOR<br>NEW YORK, NY 10004 | | PC | FOR THE LGBT & HIV PROJECT TO PURSUE LITIGATION DEFENDING MARRIAGE EQUALITY AND ADVANCING NONDISCRIMINATION PROTECTIONS FOR GAY PEOPLE. $200,000 | 200,000. |
| AMERICAN CIVIL LIBERTIES UNION FOUNDATION, INC.<br>125 BROAD STREET, 18TH FLOOR<br>NEW YORK, NY 10004 | | PC | FOR A NATIONAL CAMPAIGN TO EDUCATE THE PUBLIC ABOUT THE NEED TO EXTEND EQUAL CIVIL RIGHTS PROTECTIONS TO LGBT PEOPLE WHILE SAFEGUARDING RELIGIOUS LIBERTY. $100,000 | 100,000. |
| AMERICAN CIVIL LIBERTIES UNION FOUNDATION, INC.<br>125 BROAD STREET, 18TH FLOOR<br>NEW YORK, NY 10004 | | PC | FOR THE CENTENNIAL CAMPAIGN, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| AMERICA'S VOICE EDUCATIONAL FUND<br>1250 I STREET NW, SUITE 1003<br>WASHINGTON, DC 20005 | | PC | TO INCREASE PUBLIC SUPPORT FOR EXECUTIVE ACTIONS TO EXTEND DEPORTATION RELIEF AND WORK PERMITS TO MILLIONS OF UNDOCUMENTED AMERICANS. $100,000 | 100,000. |
| AMIGOS DE LAS AMERICAS - SF<br>2323 BROADWAY<br>OAKLAND, CA 94612 | | PC | FOR GENERAL SUPPORT. | 3,500. |
| ANTIDEFAMATION LEAGUE<br>720 MARKET STREET, SUITE 800<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE TORCH OF LIBERTY AWARD HONORING RICK WELTS. $10,000 | 10,000. |
| ASIAN AMERICANS ADVANCING JUSTICE - ASIAN LAW CAUCUS<br>55 COLUMBUS AVENUE<br>SAN FRANCISCO, CA 94111 | | PC | TO SUPPORT EXECUTIVE TRANSITION AND A STRONG PARTNERSHIP OF THE BOARD AND STAFF. $40,000 | 40,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES<br>1145 WILSHIRE BOULEVARD<br>LOS ANGELES, CA 90017 | | PC | FOR THE CALIFORNIA IMMIGRANT POLICY CENTER PROJECT TO ADVANCE IMMIGRANT RIGHTS AND INTEGRATION POLICIES. $200,000 | 200,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES<br>1145 WILSHIRE BOULEVARD<br>LOS ANGELES, CA 90017 | | PC | TO BUILD A STRONG ASIAN AMERICAN PACIFIC ISLANDER VOICE ON STATE POLICIES IMPACTING IMMIGRANT COMMUNITIES. $150,000 OVER TWO YEARS | 75,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES<br>1145 WILSHIRE BOULEVARD<br>LOS ANGELES, CA 90017 | | PC | TO BUILD THE GOVERNANCE AND BENCH STRENGTH OF THE CALIFORNIA IMMIGRANT POLICY CENTER. $58,000 | 58,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES 1145 WILSHIRE BOULEVARD LOS ANGELES, CA 90017 | | PC | FOR ORGANIZATIONAL REDESIGN TO SUPPORT GROWTH AND EXECUTIVE TRANSITION. $55,000 | 55,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES 1145 WILSHIRE BOULEVARD LOS ANGELES, CA 90017 | | PC | FOR THE CALIFORNIA IMMIGRANT POLICY CENTER, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES 1145 WILSHIRE BOULEVARD LOS ANGELES, CA 90017 | | PC | FOR THE CALIFORNIA IMMIGRANT POLICY CENTER PROJECT TO RAMP UP DEPORTATION DEFENSE TO KEEP CALIFORNIA FAMILIES SAFE. $175,000 | 175,000. |
| ASIAN AMERICANS/PACIFIC ISLANDERS IN PHILANTHROPY 300 FRANK H. OGAWA PLAZA, SUITE 256 OAKLAND, CA 94612 | | PC | FOR MEMBERSHIP DUES. $2,500 | 2,500. |
| ASIAN PACIFIC ENVIRONMENTAL NETWORK 426 17TH STREET, SUITE 500 OAKLAND, CA 94612 | | PC | TO INCREASE FUNDRAISING AND DEVELOP A STRONGER ORGANIZATIONAL CULTURE. $60,000 OVER TWO YEARS (2016-2018) | 60,000. |
| ASIAN PACIFIC ENVIRONMENTAL NETWORK 426 17TH STREET, SUITE 500 OAKLAND, CA 94612 | | PC | TO INCREASE CIVIC PARTICIPATION AMONG MARGINALIZED COMMUNITIES IN ALAMEDA COUNTY AND STATEWIDE. $100,000 | 100,000. |
| ASSOCIATION OF FUNDRAISING PROFESSIONALS 3871 PIEDMONT AVENUE, PMB 24 OAKLAND, CA 94611 | | PC | FOR NATIONAL PHILANTHROPY DAY. $13,500 | 13,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| BARNARD COLLEGE<br>3009 BROADWAY, 101 BARNARD HALL<br>NEW YORK, NY 10027 | | PC | FOR THE CENTER FOR RESEARCH ON WOMEN TO DEVELOP GUIDELINES TO HELP IMMIGRANT-SERVING ORGANIZATIONS BE RESPONSIVE TO THE SPECIFIC NEEDS OF GAY PEOPLE. $25,000 | 25,000. |
| BAY AREA RESCUE MISSION<br>2114 MACDONALD AVENUE<br>RICHMOND, CA 94802 | | PC | TO SHELTER AND PROVIDE NUTRITIOUS MEALS FOR HOMELESS MEN, WOMEN AND CHILDREN. $25,000 OVER TWO YEARS (2015-2017) | 12,500. |
| BAY AREA WOMEN'S AND CHILDREN'S CENTER<br>318 LEAVENWORTH STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR ONGOING SUPPORT AND EXPANDED PROGRAMS FOR TENDERLOIN WOMEN, CHILDREN AND FAMILIES. $40,000 OVER TWO YEARS (2016-2018) | 25,000. |
| BAY AREA WOMEN'S AND CHILDREN'S CENTER<br>318 LEAVENWORTH STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| BERKELEY FOOD & HOUSING PROJECT<br>1901 FAIRVIEW STREET<br>BERKELEY, CA 94703 | | PC | TO PROVIDE EMERGENCY FOOD AND SHELTER FOR HOMELESS MEN, WOMEN AND CHILDREN IN BERKELEY. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| BETTER ANGELS SOCIETY INC<br>1 ASHFIELD STREET, #3<br>SHELBURNE FALLS, MA 01370 | | PC | FOR KEN BURNS AND DAYTON DUNCAN FILMS, IN HONOR OF IRA HIRSCHFIELD. $50,000 | 50,000. |
| BLACK ALLIANCE FOR JUST IMMIGRATION<br>660 NOSTRAND AVENUE<br>BROOKLYN, NY 11216 | | PC | FOR ITS 10TH ANNIVERSARY CELEBRATION. $5,000 | 5,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| BLACK ALLIANCE FOR JUST IMMIGRATION<br>660 NOSTRAND AVENUE<br>BROOKLYN, NY 11216 | | PC | TO ENGAGE AFRICAN AMERICANS AND AFRICAN IMMIGRANTS IN LOCAL, STATE AND NATIONAL IMMIGRATION POLICY DEBATES. $150,000 OVER TWO YEARS (2015-2017) | 75,000. |
| BLACK ALLIANCE FOR JUST IMMIGRATION<br>660 NOSTRAND AVENUE<br>BROOKLYN, NY 11216 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| BLACK HERITAGE FESTIVAL INC<br>P.O. BOX 16622<br>TAMPA, FL 33687-6633 | | PC | FOR GENERAL SUPPORT. | 300. |
| BOARD OF TRUSTEES OF THE GLIDE FOUNDATION<br>330 ELLIS STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE DAILY FREE MEALS PROGRAM TO PROVIDE HOT MEALS TO LOW-INCOME AND HOMELESS INDIVIDUALS IN SAN FRANCISCO'S TENDERLOIN NEIGHBORHOOD. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| BOARD OF TRUSTEES OF THE GLIDE FOUNDATION<br>330 ELLIS STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY<br>365 LASUEN STREET, 3RD FLOOR<br>STANFORD, CA 94305-3063 | | PC | FOR THE GARDNER CENTER TO LAY THE GROUNDWORK FOR A KINDERGARTEN READINESS MEASURE TO BE USED BY SAN FRANCISCO HEAD START PROVIDERS AND SAN FRANCISCO UNIFIED. $100,000 | 100,000. |
| BOARDSOURCE<br>750 9TH STREET, NW, #650<br>WASHINGTON, DC 20001 | | PC | FOR GENERAL SUPPORT. | 1,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| BOARDSOURCE<br>750 9TH STREET, NW, SUITE 650<br>WASHINGTON, DC 20001-4590 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| BOARDSOURCE<br>750 9TH STREET, NW, SUITE 650<br>WASHINGTON, DC 20001-4590 | | PC | TO STRENGTHEN NONPROFIT BOARDS BY ADVOCATING FOR BEST PRACTICES AND EXTENDING THE REACH OF GOVERNANCE TOOLS AND RESOURCES. $60,000 | 60,000. |
| BREAD AND ROSES PRESENTS<br>233 TAMALPAIS DRIVE, # 100<br>CORTE MADERA, CA 94925 | | PC | FOR GENERAL SUPPORT. | 2,500. |
| BREAKTHROUGH COLLABORATIVE<br>545 SANSOME STREET<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| BREAST CANCER FUND<br>1388 SUTTER STREET, SUITE 400<br>SAN FRANCISCO, CA 94109-5400 | | PC | FOR GENERAL SUPPORT. $1,000 | 1,000. |
| BUCK INSTITUTE FOR AGE RESEARCH<br>8001 REDWOOD BOULEVARD<br>NOVATO, CA 94945 | | PC | FOR EDUCATION PROGRAMS. $10,000 | 10,000. |
| BUILDING OPPORTUNITIES FOR SELF-SUFFICIENCY<br>1918 UNIVERSITY AVENUE, #2A<br>BERKELEY, CA 94704 | | PC | TO PROVIDE EMERGENCY SHELTER AND MEALS FOR HOMELESS AND VERY LOW-INCOME INDIVIDUALS AND FAMILIES IN THE EAST BAY. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CALIFORNIA ACADEMY OF SCIENCE 55 MUSIC CONCOURSE DRIVE, GOLDEN GATE PARK SAN FRANCISCO, CA 94118 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| CALIFORNIA ASSOCIATION OF NON PROFITS 400 MONTGOMERY STREET, SUITE 500 SAN FRANCISCO, CA 94104 | | PC | FOR MEMBERSHIP DUES. $5,000 OVER TWO YEARS (2015-2017) | 2,500. |
| CALIFORNIA BUDGET AND POLICY CENTER 1107 9TH STREET, SUITE 310 SACRAMENTO, CA 95814 | | PC | TO ANALYZE HOW STATE BUDGET PROPOSALS AFFECT THE EDUCATION OF LOW- AND MIDDLE-INCOME STUDENTS IN CALIFORNIA AND TO EXPAND ANALYSIS OF LOCAL EDUCATION FUNDING. $75,000 OVER TWO YEARS (2016-2018) | 45,000. |
| CALIFORNIA CALLS EDUCATION FUND 4801 EXPOSITION BOULEVARD LOS ANGELES, CA 90016 | | PC | TO INCREASE THE CIVIC PARTICIPATION OF IMMIGRANTS AND AFRICAN AMERICANS IN CALIFORNIA. $200,000 | 200,000. |
| CALIFORNIA PACIFIC MEDICAL CENTER FOUNDATION 2015 STEINER STREET SAN FRANCISCO, CA 94115 | | PC | FOR GENERAL SUPPORT. $2,000 | 2,000. |
| CALIFORNIA PACIFIC MEDICAL CENTER FOUNDATION 2015 STEINER STREET SAN FRANCISCO, CA 94115 | | PC | FOR THE AFRICAN AMERICAN AND SISTER TO SISTER BREAST HEALTH PROGRAMS AND THE KALMANOVITZ CHILD DEVELOPMENT CENTER. $30,000 | 30,000. |
| CALIFORNIA PACIFIC MEDICAL CENTER FOUNDATION 2015 STEINER STREET SAN FRANCISCO, CA 94115 | | PC | FOR GENERAL SUPPORT. | 2,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CAMPAIGN FOR COLLEGE OPPORTUNITY<br>1149 SOUTH HILL STREET, SUITE 925<br>LOS ANGELES, CA 90015 | | PC | TO EDUCATE ABOUT THE NEED FOR CALIFORNIA POLICIES TO IMPROVE STUDENT SUCCESS IN COMMUNITY COLLEGES, AND TO SUPPORT THE IMPLEMENTATION OF COLLEGE ACCESS REFORMS IN THE BAY AREA. $400,000 OVER TWO YEARS (2015-2017) | 200,000. |
| CATHOLIC CHARITIES CYO OF THE ARCHDIOCESE OF SAN FRANCISCO<br>990 EDDY STREET<br>SAN FRANCISCO, CA 94109 | | PC | TO SUPPORT ST. JOSEPHS FAMILY CENTER, A SHELTER FOR HOMELESS FAMILIES IN SAN FRANCISCO. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| CENTER FOR AMERICAN PROGRESS<br>1333 H STREET, NW, 10TH FLOOR<br>WASHINGTON, DC 20005 | | PC | TO EDUCATE THE PUBLIC ABOUT THE IMPORTANCE OF PROTECTING LGBT PEOPLE FROM DISCRIMINATION. $50,000 | 50,000. |
| CENTER FOR COMMUNITY CHANGE<br>1536 U STREET, NW<br>WASHINGTON, DC 20009 | | PC | TO STRENGTHEN THE EXECUTIVE LEADERSHIP TEAM AND THE PIPELINE OF WOMEN AND PEOPLE OF COLOR. $50,000 | 50,000. |
| CENTER FOR COMMUNITY CHANGE<br>1536 U STREET, NW<br>WASHINGTON, DC 20009 | | PC | TO SUPPORT GRASSROOTS ORGANIZING AND PUBLIC EDUCATION FOR IMMIGRATION REFORM ACROSS THE U.S. $200,000 | 200,000. |
| CENTER FOR COMMUNITY CHANGE<br>1536 U STREET, NW<br>WASHINGTON, DC 20009 | | PC | FOR IMMIGRATION PROGRAMS, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| CENTER FOR EFFECTIVE PHILANTHROPY<br>675 MASSACHUSETTS AVENUE, 7TH FLOOR<br>CAMBRIDGE, MA 02139 | | PC | FOR MEMBERSHIP SUPPORT. $5,000 | 5,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CENTER FOR INDIVIDUAL OPPORTUNITY<br>WHEELER ROAD<br>BURLINGTON, MA 01803 | | PC | FOR GENERAL SUPPORT. | 2,500. |
| CENTER FOR INVESTIGATIVE REPORTING<br>1400 65TH STREET, SUITE 200<br>EMERYVILLE, CA 94608 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD.<br>$25,000 | 25,000. |
| CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY<br>2021 SPERRY AVENUE, SUITE 9<br>VENTURA, CA 93003 | | PC | TO ORGANIZE LOW-INCOME COMMUNITIES IN THE CENTRAL COAST TO ADVANCE IMMIGRANT RIGHTS. $100,000 OVER TWO YEARS (2015-2017) | 50,000. |
| CENTRO DE SERVICIOS OF ALAMEDA COUNTY<br>525 H. STREET<br>UNION CITY, CA 94587 | | PC | TO PROVIDE EMERGENCY FOOD TO LOW-INCOME AND IMMIGRANT FAMILIES IN THE TRI-CITY AREA OF ALAMEDA COUNTY.<br>$10,000 OVER TWO YEARS (2015-2017) | 5,000. |
| CHILDREN NOW<br>1404 FRANKLIN STREET, SUITE 700<br>OAKLAND, CA 94612 | | PC | TO PROMOTE ADOPTION OF POLICIES AND PRACTICES TO ADDRESS THE CAUSES AND SOLUTIONS FOR REDUCING ABSENTEEISM AND TRUANCY. $15,000 | 15,000. |
| CHILDREN NOW<br>1404 FRANKLIN STREET, SUITE 700<br>OAKLAND, CA 94612 | | PC | TO HELP SAN FRANCISCO ADVOCATES INFLUENCE THE SFUSD BUDGET TO ADVANCE GREATER EQUITY IN STUDENT SUCCESS.<br>$100,000 | 100,000. |
| CHINESE FOR AFFIRMATIVE ACTION<br>THE KUO BUILDING 17 WALTER U. LUM PLACE<br>SAN FRANCISCO, CA 94108 | | PC | FOR THE CELEBRATION OF JUSTICE GALA. $2,500 | 2,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CHINESE FOR AFFIRMATIVE ACTION<br>THE KUO BUILDING 17 WALTER U. LUM PLACE<br>SAN FRANCISCO, CA 94108 | | PC | TO PROMOTE ASIAN AMERICAN CIVIC PARTICIPATION AND INTEGRATION. $70,000 | 70,000. |
| CHINESE PROGRESSIVE ASSOCIATION<br>1042 GRANT AVENUE, 5TH FLOOR<br>SAN FRANCISCO, CA 94133 | | PC | FOR THE AAPIS FOR CIVIC EMPOWERMENT PROJECT TO INCREASE THE CIVIC PARTICIPATION OF ASIAN AMERICAN PACIFIC ISLANDERS IN CALIFORNIA. $100,000 | 100,000. |
| CHRONICLE SEASON OF SHARING FUND<br>901 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | IN-KIND GRANT FOR OFFICE SPACE AND POSTAGE. $9,800 | 9,800. |
| CHRONICLE SEASON OF SHARING FUND<br>901 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $100,000 | 100,000. |
| CHRONICLE SEASON OF SHARING FUND<br>901 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR EMERGENCY SUPPORT TO FAMILIES AND INDIVIDUALS IN THE BAY AREA. $600,000 | 600,000. |
| CHRONICLE SEASON OF SHARING FUND<br>901 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT. $2,500 | 2,500. |
| CHRONICLE SEASON OF SHARING FUND<br>901 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT. | 12,800. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CITYTEAM MINISTRIES<br>164 SIXTH STREET<br>SAN FRANCISCO, CA 94103 | | PC | TO PROVIDE FOOD TO HOMELESS INDIVIDUALS AND FAMILIES IN SAN FRANCISCO. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| CITYTEAM MINISTRIES<br>722 WASHINGTON STREET<br>OAKLAND, CA 94607 | | PC | TO SUPPORT EMERGENCY FOOD AND SHELTER PROGRAMS FOR THE POOR AND HOMELESS IN OAKLAND. $15,000 OVER TWO YEARS (2014-2016) | 7,500. |
| CKCSCR INC<br>1345 EAGLE RUN DRIVE<br>SANIBEL, FL 33957 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | FOR GENERAL SUPPORT. $100,000 | 100,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | TO DEVELOP EXECUTIVE AND SENIOR TEAM LEADERSHIP. $65,000 | 25,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | FOR PROGRAM EXPANSION. $5,500,000 OVER FIVE YEARS (2012-2016) | 1,218,377. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $50,000 | 50,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | FOR THE 2017 GAME CHANGER AWARDS. $15,000 | 15,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | TO SCALE THE PROGRAM'S REACH AND IMPACT. $5,800,000 OVER FIVE YEARS (2017-2021) | 50,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | FOR GENERAL SUPPORT. | 7,000. |
| COALITION FOR HUMANE IMMIGRANT RIGHTS OF LOS ANGELES<br>2533 W. THIRD STREET, SUITE 101<br>LOS ANGELES, CA 90057 | | PC | TO BUILD BOARD AND STAFF LEADERSHIP IN STRATEGY, FINANCE AND FUNDRAISING. $54,000 | 54,000. |
| COALITION FOR HUMANE IMMIGRANT RIGHTS OF LOS ANGELES<br>2533 W. THIRD STREET, SUITE 101<br>LOS ANGELES, CA 90057 | | PC | TO ADVANCE IMMIGRANT RIGHTS AND INTEGRATION IN LOS ANGELES COUNTY AND BEYOND. $250,000 (OVER TWO YEARS) | 125,000. |
| COALITION FOR HUMANE IMMIGRANT RIGHTS OF LOS ANGELES<br>2533 W. THIRD STREET, SUITE 101<br>LOS ANGELES, CA 90057 | | PC | FOR ITS 30TH ANNIVERSARY GALA. $2,500 | 2,500. |
| COFEM<br>125 PASEO DE LA PLAZA, SUITE 101<br>LOS ANGELES, CA 90012 | | PC | TO INCREASE CIVIC PARTICIPATION OF MEXICAN IMMIGRANTS IN CALIFORNIA. $100,000 OVER TWO YEARS (2015-2017) | 50,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| COLEMAN CHILDREN AND YOUTH SERVICES<br>459 VIENNA STREET<br>SAN FRANCISCO, CA 94112 | | PC | FOR THE STUDENTS MAKING A CHANGE PROJECT TO AMPLIFY THE VOICES OF STUDENTS IN POLICY DISCUSSIONS AT CITY COLLEGE OF SAN FRANCISCO. $70,000 | 70,000. |
| COMMUNITY AWARENESS & TREATMENT SERVICES, INC.<br>1171 MISSION STREET, 2ND FLOOR<br>SAN FRANCISCO, CA 94103 | | PC | TO SUPPORT A WOMAN'S PLACE, A 24-HOUR EMERGENCY SHELTER FOR HOMELESS WOMEN WITH SPECIAL NEEDS. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| COMMUNITY INITIATIVES<br>354 PINE STREET, SUITE 700<br>SAN FRANCISCO, CA 94104 | | PC | FOR PEER RESOURCES' CHANGE IT EXHIBITION: 2016 YOUTH LEADERSHIP SHOWCASE. $500 | 500. |
| COMMUNITY INITIATIVES<br>354 PINE STREET, SUITE 700<br>SAN FRANCISCO, CA 94104 | | PC | TO STRENGTHEN STRATEGIC COMMUNICATIONS TO ADVANCE THE WORK OF HAAS, JR. FUND GRANTEES. $50,000 | 50,000. |
| COMMUNITY INITIATIVES<br>354 PINE STREET, SUITE 700<br>SAN FRANCISCO, CA 94104 | | PC | TO STRENGTHEN STRATEGIC COMMUNICATIONS TO ADVANCE THE WORK OF HAAS, JR. FUND GRANTEES. $100,000 | 100,000. |
| COMMUNITY INITIATIVES<br>354 PINE STREET, SUITE 700<br>SAN FRANCISCO, CA 94104 | | PC | FOR THE PARENT ADVISORY COUNCIL PROJECT TO GIVE PARENTS A VOICE IN SHAPING SCHOOL DISTRICT POLICIES IN SAN FRANCISCO $50,000 | 50,000. |
| COMPASS FAMILY SERVICES<br>49 POWELL STREET, 3RD FLOOR<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE COMPASS FAMILY SHELTER TO PROVIDE EMERGENCY SHELTER AND FOOD FOR HOMELESS FAMILIES IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2015-2017) | 12,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| COMPASSPOINT NONPROFIT SERVICES<br>500 12TH STREET, SUITE 320<br>OAKLAND, CA 94607 | | PC | FOR ITS 40TH ANNIVERSARY CELEBRATION. $15,000 | 15,000. |
| COMPASSPOINT NONPROFIT SERVICES<br>500 12TH STREET, SUITE 320<br>OAKLAND, CA 94607 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| COMPASSPOINT NONPROFIT SERVICES<br>500 12TH STREET, SUITE 320<br>OAKLAND, CA 94607 | | PC | TO PILOT WAYS FOR ORGANIZATIONS TO ADOPT A CULTURE OF PHILANTHROPY AND TO UPDATE COMPASSPOINTS EXECUTIVE TRANSITION MANAGEMENT PRACTICE. $100,000 OVER 18 MONTHS (2016-2018) | 100,000. |
| CONGREGATION SHA'AR ZAHAV<br>290 DOLORES STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| CONTEMPORARY JEWISH MUSEUM<br>736 MISSION STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT. $1,000 | 1,000. |
| CORNELL UNIVERSITY<br>410 THURSTON AVENUE<br>ITHACA, NY 14850 | | PC | FOR GENERAL SUPPORT. | 500. |
| CORNERSTONE COMMUNITY DEVELOPMENT CORPORATION<br>1395 BANCROFT AVENUE<br>SAN LEANDRO, CA 94577 | | PC | TO SUPPORT EMERGENCY SHELTERS IN ALAMEDA COUNTY FOR HOMELESS WOMEN AND CHILDREN. $20,000 OVER TWO YEARS (2015-2017) | 10,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| COUNCIL ON FOUNDATIONS<br>2121 CRYSTAL DRIVE, SUITE 700<br>ARLINGTON, VA 22202-3706 | | PC | FOR MEMBERSHIP DUES. $25,000 | 25,000. |
| DEFINE AMERICAN<br>45 W 36TH ST, 6TH FLOOR<br>NEW YORK, NY 10018 | | PC | TO HELP CHANGE NATIONAL DIALOGUE ABOUT IMMIGRANTS AND ENLIST NEW ALLIES IN THE MOVEMENT FOR REFORM. $200,000 OVER TWO YEARS (2016-2018) | 100,000. |
| DEFINE AMERICAN<br>45 W 36TH ST, 6TH FLOOR<br>NEW YORK, NY 10018 | | PC | FOR GENERAL SUPPORT. | 2,500. |
| DOLORES STREET COMMUNITY SERVICES, INC.<br>938 VALENCIA STREET<br>SAN FRANCISCO, CA 94110 | | PC | FOR THE DOLORES SHELTER PROGRAM TO PROVIDE MEALS AND EMERGENCY SHELTER FOR HOMELESS ADULTS IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| DOROTHY DAY HOUSE<br>714 8TH STREER SOUTH<br>MOORHEAD, MN 56560 | | PC | FOR GENERAL SUPPORT. | 2,000. |
| DOROTHY DAY HOUSE<br>CATHOLIC WORKER OF BERKELEY, P. O. BOX<br>12701 BERKELEY, CA 94712 | | PC | TO PROVIDE EMERGENCY FOOD AND SHELTER TO HOMELESS AND LOW-INCOME RESIDENTS OF BERKELEY. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| EAST BAY ASIAN YOUTH CENTER<br>2025 EAST 12TH STREET<br>OAKLAND, CA 94606 | | PC | FOR ITS 40TH ANNIVERSARY GALA. $1,000 | 1,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| EAST OAKLAND COMMUNITY PROJECT<br>7515 INTERNATIONAL BOULEVARD<br>OAKLAND, CA 94621 | | PC | TO SUPPORT CROSSROADS, AN EMERGENCY SHELTER IN OAKLAND FOR HOMELESS INDIVIDUALS, FAMILIES AND PERSONS LIVING WITH HIV/AIDS. $25,000 OVER TWO YEARS (2015-2017) | 12,500. |
| EDSOURCE INC.<br>436 14TH STREET, SUITE 1005<br>OAKLAND, CA 94612 | | PC | TO PROVIDE NEWS ANALYSES OF KEY EDUCATION REFORM ISSUES IN CALIFORNIA. $85,000 OVER TWO YEARS (2016-2018) | 42,500. |
| EDUCATION TRUST<br>1814 FRANKLIN STREET, SUITE 600<br>OAKLAND, CA 94612 | | PC | FOR EDUCATION TRUSTWEST TO ANALYZE HOW HIGH-ACHIEVING SCHOOL DISTRICTS ARE USING THE LOCAL CONTROL FUNDING FORMULA TO ADVANCE EDUCATION EQUITY. $125,000 | 125,000. |
| EDUCATIONAL RESULTS PARTNERSHIP<br>2300 N STREET, SUITE 3<br>SACRAMENTO, CA 95816 | | PC | TO SUPPORT CITY COLLEGE'S BRIDGE TO SUCCESS INITIATIVE TO IMPROVE COLLEGE READINESS AMONG SFUSD STUDENTS. $125,000 | 125,000. |
| EDUCATIONAL RESULTS PARTNERSHIP<br>2300 N STREET, SUITE 3<br>SACRAMENTO, CA 95816 | | PC | TO HELP SAN FRANCISCO UNIFIED IDENTIFY EFFECTIVE STRATEGIES FOR INCREASING AFRICAN AMERICAN ACHIEVEMENT. $25,000 | 25,000. |
| ENACT LEADERSHIP<br>2748 ADELINE STREET, SUITE B<br>BERKELEY, CA 94703 | | NC | FOR EXECUTIVE AND SENIOR TEAM DEVELOPMENT SUPPORT OF LEADERS WHO ARE DRIVING CHANGE IN THE SAN FRANCISCO UNIFIED SCHOOL DISTRICT. $115,000 | 115,000. |
| EPISCOPAL COMMUNITY SERVICES OF SAN FRANCISCO<br>165 EIGHTH STREET, 3RD FLOOR<br>SAN FRANCISCO, CA 94103 | | PC | TO SUPPORT EMERGENCY SHELTERS FOR HOMELESS INDIVIDUALS IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| EQUALITY ALLIANCE OF SAN DIEGO COUNTY<br>P.O. BOX 12266<br>SAN DIEGO, CA 92112-3266 | | PC | TO PROMOTE IMMIGRANT RIGHTS AND CIVIC PARTICIPATION IN SAN DIEGO COUNTY. $200,000 OVER TWO YEARS (2016-2018) | 100,000. |
| EQUALITY ALLIANCE OF SAN DIEGO COUNTY<br>P.O. BOX 12266<br>SAN DIEGO, CA 92112-3266 | | PC | TO MANAGE COMMUNICATIONS AND HUMANITARIAN RESPONSES TO THE HAITIAN REFUGEE CRISIS IN SAN DIEGO. $35,000 | 35,000. |
| EQUALITY ALLIANCE OF SAN DIEGO COUNTY<br>P.O. BOX 12266<br>SAN DIEGO, CA 92112-3266 | | PC | FOR STRATEGIC PLANNING AND BUILDING A STRONG SENIOR TEAM. $35,000 | 35,000. |
| EQUALITY CALIFORNIA INSTITUTE<br>202 W 1ST STREET, SUITE 3-0130<br>LOS ANGELES, CA 90012 | | PC | TO PROMOTE CITIZENSHIP AND ADMINISTRATIVE RELIEF FOR DREAMERS AND TO EDUCATE THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $200,000 | 200,000. |
| EQUALITY CALIFORNIA INSTITUTE<br>202 W 1ST STREET, SUITE 3-0130<br>LOS ANGELES, CA 90012 | | PC | FOR A CONVENING OF CALIFORNIA GAY ORGANIZATIONS TO COORDINATE IMMIGRANT RIGHTS WORK, INCLUDING INCREASING CITIZENSHIP AND DACA APPLICATIONS. $10,000 | 10,000. |
| EQUALITY FEDERATION INSTITUTE<br>818 SW 3RD AVENUE #141<br>PORTLAND, OR 97204-2405 | | PC | TO ENGAGE GRASSROOTS MARRIAGE EQUALITY ACTIVISTS TO SUPPORT EFFORTS TO SECURE CIVIL RIGHTS PROTECTIONS FOR GAY AMERICANS. $50,000 | 50,000. |
| EQUALITY FEDERATION INSTITUTE<br>818 SW 3RD AVENUE #141<br>PORTLAND, OR 97204-2405 | | PC | TO SUPPORT RESEARCH AND COMMUNICATIONS ASSISTANCE FOR STATE AND LOCAL PUBLIC EDUCATION CAMPAIGNS ON NONDISCRIMINATION ISSUES. $185,000 | 185,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| EQUALITY NORTH CAROLINA FOUNDATION<br>P.O. BOX 28768<br>RALEIGH, NC 27611 | | PC | FOR BOARD DEVELOPMENT, SENIOR TEAM DEVELOPMENT AND EXECUTIVE COACHING. $39,000 | 39,000. |
| EQUALITY NORTH CAROLINA FOUNDATION<br>P.O. BOX 28768<br>RALEIGH, NC 27611 | | PC | TO ENGAGE PEOPLE OF FAITH IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| EQUALITY OHIO EDUCATION FUND<br>118 E. MAIN STREET, SUITE 200<br>COLUMBUS, OH 43215 | | PC | TO EDUCATE THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $145,000 | 145,000. |
| EXPLORATORIUM<br>PIER 15<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. $2,000 | 2,000. |
| EYEPOP PRODUCTIONS<br>565 RUGBY ROAD<br>BROOKLYN, NY 11230 | | NC | TO ENSURE THE BROAD DISTRIBUTION OF ITS "FREEDOM TO MARRY," DOCUMENTARY ON HOW THE GAY MOVEMENT MOVED THE NATION TO EMBRACE THE FREEDOM TO MARRY. $50,000 | 50,000. |
| FAITH IN PUBLIC LIFE INC<br>1111 14TH ST NW, SUITE 900<br>WASHINGTON, DC 20005 | | PC | TO BUILD STATE-BASED NETWORKS OF MAINSTREAM FAITH LEADERS TO INFORM PUBLIC DEBATES AROUND NONDISCRIMINATION PROTECTIONS FOR LGBT PEOPLE. $100,000 | 100,000. |
| FAMILY CAREGIVER ALLIANCE<br>785 MARKET STREET, SUITE 750<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| FAMILY CAREGIVER ALLIANCE<br>785 MARKET STREET, SUITE 750<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT. | 600. |
| FAMILY EMERGENCY SHELTER COALITION<br>21455 BIRCH STREET, #5<br>HAYWARD, CA 94541 | | PC | FOR LES MARQUIS HOUSE TO PROVIDE EMERGENCY SHELTER AND FOOD TO HOMELESS FAMILIES IN ALAMEDA COUNTY. $15,000 OVER TWO YEARS (2016-2018) | 7,500. |
| FARMWORKER JUSTICE FUND, INC.<br>1126 16TH STREET, NW, SUITE 270<br>WASHINGTON, DC 20036 | | PC | TO IMPROVE LIVING CONDITIONS, WORKING CONDITIONS AND LEGAL STATUS FOR FARMWORKERS AND THEIR FAMILIES. $150,000 OVER TWO YEARS (2016-2018) | 75,000. |
| FOOD RUNNERS<br>2579 WASHINGTON STREET<br>SAN FRANCISCO, CA 94115 | | PC | TO PICK UP AND DELIVER SALVAGED FOOD TO SAN FRANCISCO SHELTERS AND FOOD PROGRAMS. $50,000 OVER TWO YEARS (2016-2018) | 25,000. |
| FOOD RUNNERS<br>2579 WASHINGTON STREET<br>SAN FRANCISCO, CA 94115 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| FOUNDATION CENTER<br>312 SUTTER STREET, STE 606<br>SAN FRANCISCO, CA 94108-4323 | | PC | TO HELP THE PUBLIC FIND INFORMATION ON GRANT RESOURCES. $15,000 OVER TWO YEARS (2016-2018) | 7,500. |
| FOUNDATION OF CITY COLLEGE OF SAN FRANCISCO<br>P.O. BOX 40488<br>SAN FRANCISCO, CA 94140 | | PC | TO STRENGTHEN BOARD GOVERNANCE AND RETAIN ACCREDITATION. $200,000 | 100,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| FOUNDATION OF CITY COLLEGE OF SAN FRANCISCO<br>P.O. BOX 40488<br>SAN FRANCISCO, CA 94140 | | PC | FOR CITY COLLEGE TO DEVELOP FOUR HIGH-DEMAND CAREER PATHWAYS TO INCREASE STUDENT SUCCESS. $100,000 | 100,000. |
| FREEDOM CENTER FOR SOCIAL JUSTICE<br>4921 ALBEMARLE ROAD, SUITE 201<br>CHARLOTTE, NC 28205 | | PC | TO ENGAGE AFRICAN AMERICAN CLERGY AND FAITH COMMUNITIES IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $35,000 | 35,000. |
| FREEDOM FOR ALL AMERICANS EDUCATION FUND<br>1775 PENNSYLVANIA AVENUE, NW, STE 350<br>WASHINGTON, DC 20006 | | PC | TO PARTNER WITH THE NATIONAL LGBTQ TASK FORCE IN SUPPORTING FAITH ORGANIZING IN HIGH PRIORITY STATES. $200,000 | 100,000. |
| FREEDOM FOR ALL AMERICANS EDUCATION FUND<br>1775 PENNSYLVANIA AVENUE, NW, SUITE 350<br>WASHINGTON, DC 20006 | | PC | TO COORDINATE PUBLIC EDUCATION CAMPAIGNS TO INCREASE UNDERSTANDING OF AND SUPPORT FOR THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $200,000 | 200,000. |
| FRIENDS OF THE FROMM INSTITUTE FOR LIFE-LONG LEARNING<br>FROMM HALL 2130 FULTON STREET<br>SAN FRANCISCO, CA 94117 | | SO III FI | FOR GENERAL SUPPORT. $10,000 | 10,000. |
| FUNDERS FOR LGBTQ ISSUES<br>104 W. 29TH STREET, 4TH FLOOR<br>NEW YORK, NY 10001 | | PC | TO INCREASE PHILANTHROPIC GIVING TO THE GAY COMMUNITY. $90,000 OVER TWO YEARS (2016-2018) | 50,000. |
| GEORGETOWN UNIVERSITY<br>37TH AND O STREETS, NW<br>WASHINGTON, DC 20057 | | PC | FOR THE CENTER FOR LAW AND SOCIAL CHANGE TO SHARE WITH OTHER SOCIAL JUSTICE MOVEMENTS LESSONS THAT WERE LEARNED IN THE STRUGGLE TO ACHIEVE MARRIAGE EQUALITY. $300,000 OVER TWO YEARS (2016-2018) | 150,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| GEORGETOWN UNIVERSITY<br>37TH AND O STREETS, NW<br>WASHINGTON, DC 20057 | | PC | FOR EVAN WOLFSON'S PROJECT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| GLBT CMTY CTR OF CENTRAL FLORIDA<br>1800 MARKET STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT. | 2,000. |
| GLBTQ LEGAL ADVOCATES & DEFENDERS, INC.<br>30 WINTER STREET, SUITE 800<br>BOSTON, MA 02108 | | PC | TO PURSUE LITIGATION TO DEFEND MARRIAGE EQUALITY AND ADVANCE NONDISCRIMINATION PROTECTIONS FOR GAY PEOPLE. $200,000 | 200,000. |
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | FOR GENERAL SUPPORT. $10,000 | 10,000. |
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | TO SUPPORT THE TRAILS FOREVER DINNER. $30,000 | 30,000. |
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| **Total from continuation sheets** | | | | |

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# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | FOR THE I-YEL PROGRAM, IN HONOR OF IRA HIRSCHFIELD. $50,000 | 50,000. |
| GOLDEN GATE NATIONAL PARKS CONSERVANCY<br>FORT MASON, BUILDING 201<br>SAN FRANCISCO, CA 94123 | | PC | FOR GENERAL SUPPORT. | 250. |
| GOOD SAMARITAN FAMILY RESOURCE CENTER OF SAN FRANCISCO<br>1294 POTRERO AVENUE<br>SAN FRANCISCO, CA 94110 | | PC | FOR STRATEGIC PLANNING FOR A FAMILY RESOURCE CENTER SERVING LATINO IMMIGRANTS IN SAN FRANCISCO. $5,500 | 5,500. |
| GOODWIN SIMON STRATEGIC RESEARCH<br>1730 FRANKLIN STREET, SUITE 211<br>OAKLAND, CA 94612 | | NC | TO SUPPORT RESEARCH AND DEVELOP MESSAGES ON THE IMPORTANCE OF NONDISCRIMINATION PROTECTIONS FOR LESBIAN, GAY, BISEXUAL AND TRANSGENDER PEOPLE. $75,000 | 75,000. |
| GRANTMAKERS CONCERNED WITH IMMIGRANTS AND REFUGEES<br>P.O. BOX 1100<br>SEBASTOPOL, CA 95473-1100 | | PC | TO INCREASE PHILANTHROPIC SUPPORT FOR IMMIGRANT INTEGRATION IN CALIFORNIA AND NATIONALLY AND TO SUPPORT THE 2018 NATIONAL CONVENING IN LOS ANGELES. $205,000 OVER TWO YEARS (2014-2016) | 90,000. |
| GRANTMAKERS FOR EDUCATION<br>720 SW WASHINGTON STREET, SUITE 605<br>PORTLAND, OR 97205 | | PC | FOR MEMBERSHIP SUPPORT. $4,000 | 4,000. |
| GRANTMAKERS FOR EDUCATION<br>720 SW WASHINGTON STREET, SUITE 605<br>PORTLAND, OR 97205 | | PC | FOR THE GRANTMAKERS FOR EDUCATION EQUITY IMPACT GROUP TO SUPPORT FUNDER COLLABORATION TO IMPROVE EQUITY IN PUBLIC EDUCATION. $10,000 | 10,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS<br>1725 DESALES STREET, NW, SUITE 404<br>WASHINGTON, DC 20036 | | PC | TO HELP FOUNDATIONS ADOPT BEST PRACTICES IN GRANTMAKING, INCLUDING PRIORITIZING LEADERSHIP DEVELOPMENT. $140,000 OVER TWO YEARS (2016-2018) | 90,000. |
| GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING<br>1904 FRANKLIN STREET, SUITE 705<br>OAKLAND, CA 94612 | | PC | TO SUPPORT TRAINING IN FUNDRAISING FOR SOCIAL JUSTICE GROUPS. $11,000 | 11,000. |
| GREENLINING INSTITUTE<br>360 14TH STREET<br>OAKLAND, CA 94612 | | PC | FOR GENERAL SUPPORT. | 11,000. |
| GUIDESTAR USA, INC.<br>4801 COURTHOUSE STREET, SUITE 220<br>WILLIAMSBURG, VA 23188 | | PC | TO SUPPORT THE ESTABLISHMENT OF A NEW WEST COAST OFFICE. $25,000 | 25,000. |
| HAMILTON FAMILIES<br>1631 HAYES STREET<br>SAN FRANCISCO, CA 94117 | | PC | TO PROVIDE EMERGENCY SHELTER TO HOMELESS FAMILIES IN SAN FRANCISCO. $20,000 OVER TWO YEARS (2015-2017) | 10,000. |
| HAMILTON FAMILIES<br>1631 HAYES STREET<br>SAN FRANCISCO, CA 94117 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| HAMILTON FAMILIES<br>1631 HAYES STREET<br>SAN FRANCISCO, CA 94117 | | PC | TO HELP END HOMELESSNESS AMONG STUDENTS IN SAN FRANCISCO PUBLIC SCHOOLS. $40,000 | 40,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| HAMILTON FAMILY CENTER<br>1631 HAYES STREET<br>SAN FRANCISCO, CA 94117 | | PC | FOR GENERAL SUPPORT. | 200. |
| HARBOR HOUSE MINISTRIES INC<br>1811 11TH AVENUE<br>OAKLAND, CA 94606 | | PC | FOR THE EMERGENCY FOOD & CLOTHING SERVICES PROGRAM TO PROVIDE FOOD TO LOW INCOME FAMILIES IN OAKLAND'S SAN ANTONIO DISTRICT. $10,000 OVER TWO YEARS (2015-2017) | 5,000. |
| HISPANIC SCHOLARSHIP FUND<br>1411 W 190TH STREET, #700<br>GARDENA, CA 90248 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| HISPANICS IN PHILANTHROPY<br>414 13TH STREET, SUITE 200<br>OAKLAND, CA 94612 | | PC | FOR ORGANIZATIONAL MEMBERSHIP. $5,000 | 5,000. |
| HISPANICS IN PHILANTHROPY<br>414 13TH STREET, SUITE 200<br>OAKLAND, CA 94612 | | PC | FOR EXECUTIVE TRANSITION SUPPORT. $10,000 | 10,000. |
| HOMELESS PRENATAL PROGRAM<br>2500 18TH STREET<br>SAN FRANCISCO, CA 94110 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| HOMELESS PRENATAL PROGRAM<br>2500 18TH STREET<br>SAN FRANCISCO, CA 94110 | | PC | TO PROVIDE EMERGENCY FOOD AND REFERRALS FOR EMERGENCY SHELTER FOR HOMELESS MOTHERS, PREGNANT WOMEN AND THEIR FAMILIES. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111 | | PC | TO IMPROVE FUNDRAISING SKILLS IN GAY ORGANIZATIONS AND TO SUPPORT EXECUTIVE AND BOARD LEADERSHIP $220,000 OVER 18 MONTHS (2015-2017) | 25,000. |
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111 | | PC | FOR THE NOW AND FOREVER CAMPAIGN, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111 | | PC | TO IMPROVE FUNDRAISING SKILLS IN GAY ORGANIZATIONS AND TO SUPPORT LGBT EXECUTIVE DIRECTORS IN THE BAY AREA. $160,000 | 150,275. |
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. | 200. |
| HOW KIDS LEARN FOUNDATION<br>467 RICH STREET<br>OAKLAND, CA 94609 | | PC | FOR A HISTORY OF THE AFTERSCHOOL MOVEMENT. $10,000 | 10,000. |
| HOW KIDS LEARN FOUNDATION<br>467 RICH STREET<br>OAKLAND, CA 94609 | | PC | FOR ITS ANNUAL CONFERENCE. $1,500 | 1,500. |
| HUCKLEBERRY YOUTH PROGRAMS, INC.<br>3310 GEARY BOULEVARD<br>SAN FRANCISCO, CA 94118 | | PC | FOR HUCKLEBERRY HOUSE TO PROVIDE EMERGENCY SHELTER TO SAN FRANCISCO YOUTH IN CRISIS. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| IMMIGRANT LEGAL RESOURCE CENTER<br>1663 MISSION STREET, SUITE 602<br>SAN FRANCISCO, CA 94103 | | PC | TO INCREASE CITIZENSHIP IN CALIFORNIA AND NATIONALLY THROUGH THE NEW AMERICANS CAMPAIGN PROJECT. $1,110,000 OVER TWO YEARS (2016-2018) | 580,000. |
| INDEPENDENT SECTOR<br>1602 L STREET, NW, SUITE 900<br>WASHINGTON, DC 20036 | | PC | FOR MEMBERSHIP DUES. $12,500 | 12,500. |
| INLAND CONGREGATIONS UNITED FOR CHANGE SPONSORING COMMITTEE, INC.<br>1441 NORTH D STREET, SUITE 208<br>SAN BERNARDINO, CA 92405 | | PC | FOR THE INLAND COALITION FOR IMMIGRANT JUSTICE PROJECT TO STRENGTHEN THE IMMIGRANT RIGHTS MOVEMENT IN THE INLAND EMPIRE. $50,000 | 50,000. |
| INTERFAITH MOVEMENT FOR HUMAN INTEGRITY<br>5080 N. MAYWOOD AVENUE<br>LOS ANGELES, CA 90041 | | PC | TO STRENGTHEN BOARD AND STAFF LEADERSHIP FOR IMPROVED COMMUNICATIONS AND FUNDRAISING. $50,000 | 50,000. |
| INTERFAITH MOVEMENT FOR HUMAN INTEGRITY<br>5080 N. MAYWOOD AVENUE<br>LOS ANGELES, CA 90041 | | PC | TO ENGAGE DIVERSE FAITH COMMUNITIES IN PROMOTING IMMIGRANT RIGHTS AND INTEGRATION. $75,000 | 75,000. |
| INTERNATIONAL RESCUE COMMITTEE<br>440 GRAND AVENUE #500<br>OAKLAND, CA 94610 | | PC | FOR GENERAL SUPPORT. | 480. |
| JEWISH COMMUNITY FEDERATION OF SAN FRANCISCO, THE PENINSULA, MARIN & SONOMA<br>121 STEUART STREET<br>SAN FRANCISCO, CA 94105-9926 | | PC | FOR GENERAL SUPPORT. $175,000 OVER TWO YEARS (2016-2018) | 100,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| JEWISH HOME AND SENIOR LIVING FOUNDATION<br>302 SILVER AVENUE<br>SAN FRANCISCO, CA 94112-1596 | | PC | TO SUPPORT THE JEWISH HOME'S CAPITAL CAMPAIGN. $250,000 OVER FIVE YEARS (2016-2020) | 50,000. |
| KENYON COLLEGE<br>103 COLLEGE ROAD<br>GAMBIER, OH 43022 | | PC | FOR GENERAL SUPPORT. | 2,400. |
| KOHALA KORRAL INC<br>P.O. BOX 248<br>HAWI, HI 96719 | | PC | FOR GENERAL SUPPORT. | 8,000. |
| LA CASA DE LAS MADRES<br>1663 MISSION STREET, SUITE 225<br>SAN FRANCISCO, CA 94103 | | PC | TO PROVIDE EMERGENCY SHELTER FOR WOMEN AND CHILDREN ESCAPING DOMESTIC VIOLENCE. $20,000 OVER TWO YEARS (2015-2017) | 10,000. |
| LA CASA DE LAS MADRES<br>1663 MISSION STREET, SUITE 225<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| LAMBDA LEGAL DEFENSE AND EDUCATION FUND<br>120 WALL STREET, 19TH FLOOR<br>NEW YORK, NY 10005-3904 | | PC | TO PURSUE LITIGATION DEFENDING MARRIAGE EQUALITY AND ADVANCING NONDISCRIMINATION PROTECTIONS FOR GAY PEOPLE. $200,000 | 200,000. |
| LARKIN STREET YOUTH SERVICES<br>134 GOLDEN GATE AVE<br>SAN FRANCISCO, CA 94102 | | PC | TO PROVIDE EMERGENCY HOUSING TO HOMELESS YOUTH IN SAN FRANCISCO. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| LAUREL LEARNING CENTER<br>11484 WASHINGTON PLAZA WEST<br>RESTON, VA 20190 | | PC | FOR GENERAL SUPPORT. | 22,500. |
| LEGAL AID SOCIETY OF SAN FRANCISCO<br>180 MONTGOMERY STREET, SUITE 600<br>SAN FRANCISCO, CA 94104-4244 | | PC | FOR THE FAIR PLAY FOR GIRLS IN SPORTS PROGRAM.<br>$10,000 | 10,000. |
| LGBT LABOR LEADERSHIP INITIATIVE<br>815 16TH STREET NW<br>WASHINGTON, DC 20006 | | PC | TO ENLIST UNION LOCAL LEADERS IN SUPPORTING<br>NONDISCRIMINATION PROTECTIONS FOR LGBT PEOPLE.<br>$30,000 | 30,000. |
| MANAGEMENT CENTER<br>1710 RHODE ISLAND AVENUE, NW, STE 1100<br>WASHINGTON, DC 20036 | | PC | TO HELP SOCIAL JUSTICE LEADERS ADOPT BEST PRACTICES<br>IN MANAGEMENT AND STRENGTHEN THE PERFORMANCE OF THEIR<br>TEAMS. $100,000 | 100,000. |
| MANY VOICES<br>3133 DUMBARTON STREET, NW<br>WASHINGTON, DC 20007 | | PC | TO ENGAGE AFRICAN AMERICAN CLERGY IN EDUCATING NORTH<br>CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM<br>DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| MARIN COUNTRY DAY SCHOOL<br>5221 PARADISE DRIVE<br>CORTE MADERA, CA 94925 | | PC | FOR GENERAL SUPPORT. | 4,000. |
| MDP FOUNDATION<br>225 POTRERO AVENUE<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD.<br>$10,000 | 10,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| MEALS ON WHEELS OF SAN FRANCISCO<br>1375 FAIRFAX AVENUE<br>SAN FRANCISCO, CA 94124 | | PC | FOR GENERAL SUPPORT. $1,000 | 1,000. |
| MEDIATE ART GROUP<br>2665 MISSION STREET<br>SAN FRANCISCO, CA 94110 | | PC | FOR GENERAL SUPPORT. | 300. |
| MEI FONG AND ASSOCIATES<br>3543 18TH STREET, #19<br>SAN FRANCISCO, CA 94110 | | PC | TO PROVIDE EMERGENCY SHELTER FOR VICTIMS OF DOMESTIC VIOLENCE IN THE BAY AREA. $10,000 OVER TWO YEARS (2015-2017) | 5,000. |
| MEXICAN AMERICAN LEGAL DEFENSE AND EDUCATIONAL FUND<br>634 S. SPRING STREET<br>LOS ANGELES, CA 90014 | | PC | FOR THE CALIFORNIA IMMIGRANT YOUTH JUSTICE ALLIANCE PROJECT TO DEVELOP IMMIGRANT YOUTH LEADERS AND AMPLIFY THE VOICES OF UNDOCUMENTED COMMUNITIES. $120,000 OVER TWO YEARS (2015-2017) | 60,000. |
| MEXICAN AMERICAN LEGAL DEFENSE AND EDUCATIONAL FUND<br>634 S. SPRING STREET<br>LOS ANGELES, CA 90014 | | PC | TO PROTECT THE CIVIL RIGHTS OF AND INCREASE OPPORTUNITIES FOR LATINO IMMIGRANTS IN CALIFORNIA. $160,000 | 160,000. |
| MEXICAN AMERICAN LEGAL DEFENSE AND EDUCATIONAL FUND<br>634 S. SPRING STREET<br>LOS ANGELES, CA 90014 | | PC | FOR THE CALIFORNIA IMMIGRANT YOUTH JUSTICE ALLIANCE PROJECT TO BUILD FUNDRAISING, GOVERNANCE, AND LEADERSHIP CAPACITIES. $52,000 | 52,000. |
| MINISTER ELDERS AND DEACONS OF THE REFORMED PROTESTANT DUTCH CHURCH OF NY<br>145 W 28TH STREET, 11TH FLOOR<br>NEW YORK, NY 10001 | | PC | FOR THE BELIEVE OUT LOUD PROJECT TO ENGAGE CHRISTIANS AROUND THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $150,000 | 150,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| MOBILIZE THE IMMIGRANT VOTE<br>436 14TH STREET, 5TH FLOOR<br>OAKLAND, CA 94612 | | PC | TO SUPPORT DIRECTION SETTING AND STRATEGIC COMMUNICATIONS. $45,000 | 45,000. |
| MOBILIZE THE IMMIGRANT VOTE<br>436 14TH STREET, 5TH FLOOR<br>OAKLAND, CA 94612 | | PC | TO INCREASE IMMIGRANT CIVIC PARTICIPATION THROUGHOUT CALIFORNIA. $150,000 OVER TWO YEARS (2016-2018) | 75,000. |
| MONO LAKE COMMITTEE<br>P.O. BOX 29<br>LEE VINING, CA 93541 | | PC | FOR GENERAL SUPPORT. | 500. |
| MORE LIGHT PRESBYTERIANS<br>4737 COUNTY ROAD 101, PMB #246<br>MINNETONKA, MN 55345-2634 | | PC | TO ENGAGE PRESBYTERIAN CLERGY AND CONGREGATIONS IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| MOVEMENT ADVANCEMENT PROJECT, INC.<br>3020 CARBON PLACE, SUITE 202<br>BOULDER, CO 80301 | | PC | TO RESEARCH EFFORTS TO ADVANCE EQUAL RIGHTS FOR LGBT PEOPLE. $200,000 | 200,000. |
| MOVEMENT STRATEGY CENTER<br>436 14TH STREET, 5TH FLOOR<br>OAKLAND, CA 94612 | | PC | TO HELP LAUNCH THE BAY AREA RISING PROJECT TO INCREASE CIVIC ENGAGEMENT REGIONALLY. $50,000 | 50,000. |
| MUSEUM OF MODERN ART<br>11 WEST 53RD STREET<br>NEW YORK, NY 10019-5497 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NA LEI HULU I KA WEKIU HULA HALAU<br>153 BRADFORD ST<br>SAN FRANCISCO, CA 94110 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| NATIONAL ASSOCIATION OF LATINO ELECTED OFFICIALS (NALEO) EDUCATION FUND<br>1122 W. WASHINGTON BOULEVARD, 3RD FLOOR<br>LOS ANGELES, CA 90015 | | PC | FOR ITS 40TH ANNIVERSARY. $5,000 | 5,000. |
| NATIONAL CENTER FOR FAMILY PHILANTHROPY<br>1667 K STREET SUITE 550<br>WASHINGTON, DC 20006 | | PC | FOR GENERAL SUPPORT. $60,000 OVER TWO YEARS (2016-2018) | 30,000. |
| NATIONAL CENTER FOR FAMILY PHILANTHROPY<br>1667 K STREET SUITE 550<br>WASHINGTON, DC 20006 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| NATIONAL CENTER FOR LESBIAN RIGHTS<br>870 MARKET STREET, SUITE 370<br>SAN FRANCISCO, CA 94102 | | PC | TO PURSUE LITIGATION DEFENDING MARRIAGE EQUALITY AND ADVANCING NONDISCRIMINATION PROTECTIONS FOR GAY PEOPLE. $200,000 | 200,000. |
| NATIONAL CENTER FOR LESBIAN RIGHTS<br>870 MARKET STREET, SUITE 370<br>SAN FRANCISCO, CA 94102 | | PC | FOR NATIONAL COORDINATION OF FEDERAL LITIGATION INVOLVING ANTI-GAY DISCRIMINATION. $200,000 | 200,000. |
| NATIONAL CENTER FOR LESBIAN RIGHTS<br>870 MARKET STREET, SUITE 370<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NATIONAL CENTER FOR LESBIAN RIGHTS<br>870 MARKET STREET, SUITE 370<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE 40TH ANNIVERSARY CELEBRATION. $5,000 | 5,000. |
| NATIONAL CENTER FOR TRANSGENDER EQUALITY<br>1133 19TH ST NW, SUITE 302<br>WASHINGTON, DC 20036 | | PC | TO EDUCATE THE PUBLIC ABOUT THE NEED TO PROTECT TRANSGENDER PEOPLE FROM DISCRIMINATION. $150,000 | 150,000. |
| NATIONAL CENTER FOR TRANSGENDER EQUALITY<br>1133 19TH ST NW, SUITE 302<br>WASHINGTON, DC 20036 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| NATIONAL CENTER FOR VICTIMS OF CRIME<br>2000 M STREET NW, SUITE 480<br>WASHINGTON, DC 20036 | | PC | FOR ADMINISTRATIVE COSTS FOR A FUND TO SUPPORT VICTIMS OF THE ANTI-GAY MASS SHOOTING IN ORLANDO. $5,000 | 5,000. |
| NATIONAL COMMITTEE FOR RESPONSIVE PHILANTHROPY<br>1900 L STREET NW, SUITE 825<br>WASHINGTON, DC 20036 | | PC | FOR MEMBERSHIP DUES. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| NATIONAL COMMITTEE FOR RESPONSIVE PHILANTHROPY<br>1900 L STREET NW, SUITE 825<br>WASHINGTON, DC 20036 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| NATIONAL COUNCIL OF JEWISH WOMEN, INC.<br>2000 VAN NESS AVENUE, SUITE 411<br>SAN FRANCISCO, DC 94109 | | PC | FOR GENERAL SUPPORT IN HONOR OF SYLVIA YEE. $1,500 | 1,500. |
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| **Total from continuation sheets** | | | | |

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**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NATIONAL DAY LABORER ORGANIZING NETWORK<br>674 S LA FAYETTE PARK PLACE<br>LOS ANGELES, CA 90057 | | PC | TO AMPLIFY THE VOICES OF IMMIGRANT DAY LABORERS TO PROTECT AND EXPAND THEIR RIGHTS. $100,000 | 100,000. |
| NATIONAL DAY LABORER ORGANIZING NETWORK<br>674 S LA FAYETTE PARK PLACE<br>LOS ANGELES, CA 90057 | | PC | FOR SETTING STRATEGY AND BUILDING THE LEADERSHIP TEAMS NEEDED FOR THE NEXT PHASE OF GROWTH. $56,000 | 56,000. |
| NATIONAL IMMIGRATION FORUM<br>50 F STREET NW, SUITE 300<br>WASHINGTON, DC 20001 | | PC | TO LIFT UP FAITH, BUSINESS AND LAW ENFORCEMENT VOICES IN SUPPORT OF IMMIGRATION REFORM AND INTEGRATION. $250,000 OVER TWO YEARS (2015-2017) | 125,000. |
| NATIONAL IMMIGRATION FORUM<br>50 F STREET NW, SUITE 300<br>WASHINGTON, DC 20001 | | PC | TO AMPLIFY FAITH, BUSINESS, AND LAW ENFORCEMENT VOICES IN SUPPORT OF IMMIGRANT RIGHTS. $175,000 | 50,000. |
| NATIONAL IMMIGRATION LAW CENTER<br>3435 WILSHIRE BOULEVARD, SUITE 1600<br>LOS ANGELES, CA 90010 | | PC | TO DEFEND AND ADVANCE THE RIGHTS OF LOW-INCOME IMMIGRANTS AND THEIR FAMILIES. $300,000 OVER TWO YEARS (2016-2018) | 175,000. |
| NATIONAL IMMIGRATION LAW CENTER<br>3435 WILSHIRE BOULEVARD, SUITE 1600<br>LOS ANGELES, CA 90010 | | PC | FOR ITS 10TH COURAGEOUS LUMINARIES AWARDS DINNER. $2,500 | 2,500. |
| NATIONAL KOREAN AMERICAN SERVICE &<br>EDUCATION CONSORTIUM, INC.<br>900 S CRENSHAW BOULEVARD<br>LOS ANGELES, CA 90019 | | PC | TO STRENGTHEN BOARD AND STAFF LEADERSHIP FOR GROWTH, WITH FOCUS ON FUNDRAISING AND COMMUNICATIONS. $51,000 | 51,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NATIONAL KOREAN AMERICAN SERVICE & EDUCATION CONSORTIUM, INC. 900 S CRENSHAW BOULEVARD LOS ANGELES, CA 90019 | | PC | TO INCREASE CIVIC PARTICIPATION AND ELEVATE THE VOICES OF ASIAN AMERICAN IMMIGRATION POLICY DEBATES. $200,000 OVER TWO YEARS | 100,000. |
| NATIONAL KOREAN AMERICAN SERVICE & EDUCATION CONSORTIUM, INC. 900 S CRENSHAW BOULEVARD LOS ANGELES, CA 90019 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| NATIONAL LESBIAN & GAY JOURNALISTS ASSOCIATION 2120 L STREET, NW, SUITE 850 WASHINGTON, DC 20037 | | PC | TO PROVIDE GAY NEWSPAPER EDITORS AND BLOGGERS WITH IN-DEPTH INFORMATION ABOUT KEY ISSUES IN THE STRUGGLE FOR GAY EQUALITY AND IMMIGRATION REFORM. $160,000 OVER TWO YEARS (2014-2016) | 30,000. |
| NATIONAL LESBIAN & GAY JOURNALISTS ASSOCIATION 2120 L STREET, NW, SUITE 850 WASHINGTON, DC 20037 | | PC | TO PROVIDE GAY NEWSPAPER EDITORS AND BLOGGERS WITH IN-DEPTH INFORMATION ABOUT KEY ISSUES IN THE STRUGGLE FOR GAY EQUALITY AND IMMIGRATION REFORM. $10,700 | 5,000. |
| NATIONAL LESBIAN & GAY JOURNALISTS ASSOCIATION 2120 L STREET, NW, SUITE 850 WASHINGTON, DC 20037 | | PC | TO ORGANIZE ANNUAL CONVENINGS PROVIDING GAY NEWSPAPER EDITORS AND BLOGGERS WITH IN-DEPTH INFORMATION ABOUT KEY ISSUES IN THE STRUGGLE FOR GAY EQUALITY AND IMMIGRATION REFORM. $180,000 OVER TWO YEARS (2016-2018) | 80,000. |
| NATIONAL LGBTQ TASK FORCE 1325 MASSACHUSETTS AVENUE, NW, SUITE 600 WASHINGTON, DC 20005 | | PC | FOR THE INSTITUTE FOR WELCOMING RESOURCES AND ITS PARTNER ORGANIZATIONS, TO INCREASE PUBLIC SUPPORT FOR MARRIAGE EQUALITY AND OTHER CIVIL RIGHTS PROTECTIONS. $625,000 | 207,500. |
| NATIONAL LGBTQ TASK FORCE 1325 MASSACHUSETTS AVENUE, NW, SUITE 600 WASHINGTON, DC 20005 | | PC | TO ADVANCE EQUAL RIGHTS FOR GAY PEOPLE BY BROADENING THE GAY MOVEMENTS BASE OF LEADERSHIP. $200,000 | 47,225. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NATIONAL LGBTQ TASK FORCE<br>1325 MASSACHUSETTS AVENUE, NW, SUITE 600<br>WASHINGTON, DC 20005 | | PC | TO SUPPORT THE ANNUAL AWARD FOR OUTSTANDING LEADERSHIP ON BEHALF OF IMMIGRANT RIGHTS, PRESENTED AT THE ORGANIZATION'S ANNUAL CREATING CHANGE CONFERENCE. $5,000 | 5,000. |
| NATIONAL LGBTQ TASK FORCE<br>1325 MASSACHUSETTS AVENUE, NW, SUITE 600<br>WASHINGTON, DC 20005 | | PC | TO ADVANCE EQUAL RIGHTS FOR GAY PEOPLE BY BROADENING AND DIVERSIFYING THE GAY MOVEMENT'S BASE OF LEADERSHIP AND ENGAGING NON-GAY PROGRESSIVE ALLIES. $200,000 | 100,000. |
| NATIONAL LGBTQ TASK FORCE<br>1325 MASSACHUSETTS AVENUE, NW, SUITE 600<br>WASHINGTON, DC 20005 | | PC | FOR THE INSTITUTE FOR WELCOMING RESOURCES TO COORDINATE STATE-BASED AND NATIONAL EFFORTS TO AMPLIFY THE VOICES OF PEOPLE OF FAITH IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $280,000 OVER 18 MONTHS (2016-2018) | 140,000. |
| NATIONAL PARKINSON'S FOUNDATION<br>200 SE 1ST STREET, SUITE 800<br>MIAMI, FL 33131 | | PC | FOR GENERAL SUPPORT. | 2,600. |
| NATIONAL QUEER ASIAN PACIFIC ISLANDER ALLIANCE<br>233 FIFTH AVENUE, SUITE 4A<br>NEW YORK, NY 10016 | | PC | TO PROMOTE IMMIGRANT AND GAY RIGHTS WITHIN ASIAN AMERICAN COMMUNITIES. $130,000 OVER TWO YEARS (2016-2018) | 65,000. |
| NAVY SEAL FOUNDATION<br>1619 D STREET<br>VIRGINIA BEACH, VA 23455 | | PC | FOR GENERAL SUPPORT. | 900. |
| NEO PHILANTHROPY, INC.<br>45 WEST 36TH STREET, 6TH FLOOR<br>NEW YORK, NY 10018 | | PC | FOR MEMBERSHIP FOR THE FUNDERS' COMMITTEE FOR CIVIC PARTICIPATION PROJECT. $5,000 | 5,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NEO PHILANTHROPY, INC.<br>45 WEST 36TH STREET, 6TH FLOOR<br>NEW YORK, NY 10018 | | PC | FOR THE FOUR FREEDOMS FUND AND THE ASIAN AMERICAN PACIFIC ISLANDER CIVIC ENGAGEMENT FUND. $950,000 OVER TWO YEARS (2015-2017) | 500,000. |
| NETROOTS CONNECT INC<br>P.O. BOX 21050<br>WASHINGTON, DC 20009 | | PC | TO EDUCATE GAY BLOGGERS AND ONLINE ACTIVISTS ABOUT THE NEED FOR IMMIGRATION REFORM. $25,000 | 25,000. |
| NEW ISRAEL FUND<br>235 MONTGOMERY STREET, SUITE 920<br>SAN FRANCISCO, CA 94104 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| NEW TEACHER CENTER<br>110 COOPER STREET, SUITE 500<br>SANTA CRUZ, CA 95060 | | PC | FOR THE NEW TEACHER CENTER TO SUPPORT TEACHER INDUCTION IN SIX DISTRICTS, INCLUDING SAN FRANCISCO UNIFIED SCHOOL DISTRICT. $25,000 | 25,000. |
| NORTHERN CALIFORNIA GRANTMAKERS<br>160 SPEAR STREET, SUITE 360<br>SAN FRANCISCO, CA 94105 | | PC | FOR MEMBERSHIP DUES. $17,500 | 17,500. |
| NORTHERN PLAINS RESOURCE COUNCIL<br>220 S. 27TH STREET, SUITE A<br>BILLINGS, MT 59101 | | PC | FOR THE GOOD NEIGHBOR AGREEMENT. $10,000 | 10,000. |
| OAKLAND FUND FOR THE ARTS<br>P.O. BOX 29022<br>OAKLAND, CA 94604 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| OAKLAND MUSEUM OF CALIFORNIA FOUNDATION<br>1000 OAK STREET<br>OAKLAND, CA 94607-4820 | | PC | FOR GENERAL SUPPORT. $2,500 | 2,500. |
| OPENHOUSE<br>65 LAGUNA STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT. | 1,500. |
| PACIFIC INSTITUTE FOR COMMUNITY ORGANIZATIONS<br>171 SANTA ROSA AVENUE<br>OAKLAND, CA 94610 | | PC | TO ENGAGE CALIFORNIA FAITH COMMUNITIES IN ADVOCATING FOR THE RIGHTS OF IMMIGRANTS. $300,000 OVER TWO YEARS (2016-2018) | 150,000. |
| PACIFIC SCHOOL OF RELIGION<br>1798 SCENIC AVENUE<br>BERKELEY, CA 94709 | | PC | FOR THE UMOJA PROJECT TO ENGAGE AFRICAN AMERICAN CLERGY IN MICHIGAN IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| PALM CENTER<br>2370 MARKET STREET, #405<br>SAN FRANCISCO, CA 94114 | | PC | TO SUPPORT ARON BELKIN'S WORK, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| PARENTS FOR PUBLIC SCHOOLS, INC.<br>3543 18TH STREET, SUITE 1<br>SAN FRANCISCO, CA 94110 | | PC | TO SUPPORT PARENT EDUCATION AND ENGAGEMENT OF UNDERSERVED FAMILIES IN SAN FRANCISCO. $70,000 | 70,000. |
| PEAK GRANTMAKING, INC.<br>1666 K STREET NW, SUITE 440<br>WASHINGTON, DC 20006 | | PC | FOR INSTITUTIONAL MEMBERSHIP. $3,500 | 3,500. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| PRIDE FOUNDATION<br>2014 E. MADISON STREET, SUITE 300<br>SEATTLE, WA 98122 | | PC | TO DEFEND GAINS IN MARRIAGE EQUALITY AND NONDISCRIMINATION PROTECTIONS FOR GAY PEOPLE. $150,000 | 150,000. |
| PROJECT OPEN HAND<br>730 POLK STREET<br>SAN FRANCISCO, CA 94109 | | PC | TO PROVIDE MEALS AND GROCERIES TO SENIORS AND CRITICALLY ILL INDIVIDUALS IN SAN FRANCISCO AND ALAMEDA COUNTIES. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| PROJECT OPEN HAND<br>730 POLK STREET<br>SAN FRANCISCO, CA 94109 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $15,000 | 15,000. |
| PROTEUS FUND<br>15 RESEARCH DRIVE, SUITE B<br>AMHERST, MA 01002 | | PC | FOR THE RIGHTS, FAITH & DEMOCRACY COLLABORATIVE TO ADVANCE BASIC HUMAN RIGHTS AND AFFIRM RELIGIOUS LIBERTIES. $200,000 | 100,000. |
| PUBLIC CONVERSATIONS PROJECT, INC.<br>186 ALEWIFE BROOK PARKWAY, SUITE 212<br>CAMBRIDGE, MA 02138 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| PUBLIC POLICY INSTITUTE OF CALIFORNIA<br>500 WASHINGTON STREET, SUITE 600<br>SAN FRANCISCO, CA 94111 | | PC | TO FOCUS THE ATTENTION OF SCHOOL DISTRICT LEADERS ON THE ACADEMIC NEEDS OF ENGLISH LEARNERS AND LOW-INCOME STUDENTS. $75,000 OVER TWO YEARS | 37,500. |
| PUBLIC RELIGION RESEARCH INSTITUTE<br>2027 MASSACHUSETTS AVENUE NW, 3RD FLOOR<br>WASHINGTON, DC 20036 | | PC | TO STUDY THE ATTITUDES OF AMERICANS ON LGBT ISSUES IN ALL 50 STATES. $160,000 | 160,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| PUBLIC RELIGION RESEARCH INSTITUTE<br>2027 MASSACHUSETTS AVENUE NW, 3RD FLOOR<br>WASHINGTON, DC 20036 | | PC | FOR GENERAL SUPPORT. $500 | 500. |
| RADIO BILINGUE, INC.<br>5005 EAST BELMONT AVENUE<br>FRESNO, CA 93727 | | PC | TO SUPPORT SPANISH-LANGUAGE PUBLIC RADIO PROGRAMMING ON IMMIGRATION POLICIES AND CIVIC PARTICIPATION IN CALIFORNIA. $100,000 OVER TWO YEARS (2016-2018) | 50,000. |
| RAPHAEL HOUSE OF SAN FRANCISCO<br>1065 SUTTER STREET<br>SAN FRANCISCO, CA 94109-5817 | | PC | TO PROVIDE EMERGENCY SHELTER FOR HOMELESS SAN FRANCISCO FAMILIES. $25,000 OVER TWO YEARS (2015-2017) | 12,500. |
| RAPHAEL HOUSE OF SAN FRANCISCO<br>1065 SUTTER STREET<br>SAN FRANCISCO, CA 94109-5817 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| READ-ALOUD VOLUNTEER PROGRAM<br>1 ALVARADO STREET<br>SAN PABLO, CA 94806 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| RECONCILING MINISTRIES NETWORK<br>123 WEST MADISON STREET, SUITE 2150<br>CHICAGO, IL 60602-4511 | | PC | TO ENGAGE METHODIST CLERGY AND LAY PEOPLE IN GEORGIA IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| RECONCILINGWORKS: LUTHERANS FOR FULL PARTICIPATION<br>1669 ARCADE STREET NORTH, SUITE 2<br>ST. PAUL, MN 55106-1041 | | PC | TO DEVELOP BOARD AND STAFF LEADERSHIP AND ENHANCE FUNDRAISING CAPACITY. $35,000 | 35,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| RED TAB FOUNDATION<br>LEVIS PLAZA 1155 BATTERY STREET, LS7<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| RED TAB FOUNDATION<br>LEVIS PLAZA 1155 BATTERY STREET, LS7<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. $25,000 | 25,000. |
| REFORMATION PROJECT INC.<br>P.O. BOX 14862<br>LENEXA, KS 66285 | | PC | TO PROMOTE RESPECTFUL DIALOGUE WITHIN THE EVANGELICAL CHURCH ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $50,000 | 50,000. |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY<br>109 MOSES HALL<br>BERKELEY, CA 94720-2370 | | PC | FOR THE INSTITUTE OF GOVERNMENTAL STUDIES TO STUDY THE LONG-TERM EFFECTS OF DOOR-TO-DOOR CANVASSING IN INCREASING SUPPORT FOR NONDISCRIMINATION PROTECTIONS FOR LGBT PEOPLE. $10,000 | 10,000. |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY<br>1995 UNIVERSITY AVENUE<br>BERKELEY, CA 94720 | | PC | FOR CAL PERFORMANCES EDUCATION AND COMMUNITY PROGRAMS. $25,000 | 25,000. |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA<br>ONE SHIELDS AVENUE<br>DAVIS, CA 95616 | | PC | FOR THE WHEELHOUSE CENTER FOR COMMUNITY COLLEGE LEADERSHIP AND RESEARCH TO BUILD THE SKILLS OF COMMUNITY COLLEGE LEADERS ACROSS CALIFORNIA. $100,000 | 100,000. |
| REGENTS UNIVERSITY OF CALIFORNIA LOS ANGELES<br>P.O. BOX 951476<br>LOS ANGELES, CA 90095-1476 | | PC | FOR THE WILLIAMS INSTITUTE TO CONDUCT AND DISSEMINATE RESEARCH ON THE IMPACT OF SUPPORTIVE AND DISCRIMINATORY LGBT POLICIES. $50,000 | 50,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| RENAISSANCE ENTREPRENEURSHIP CENTER<br>275 FIFTH STREET<br>SAN FRANCISCO, CA 94124 | | PC | FOR THE SMALL BUSINESS-BIG IMPACT ANNUAL EVENT HONORING PAM DAVID. $1,000 | 1,000. |
| ROCKWOOD LEADERSHIP INSTITUTE<br>1212 BROADWAY, SUITE 700<br>OAKLAND, CA 94612 | | PC | TO DEVELOP ITS SENIOR TEAM DEVELOPMENT AND TO INTEGRATE A CULTURE OF PHILANTHROPY INTO ITS WORK. $50,000 OVER 18 MONTHS | 50,000. |
| RUBY'S PLACE<br>1180 B STREET<br>HAYWARD, CA 94541 | | PC | FOR AN EMERGENCY SHELTER FOR HOMELESS INDIVIDUALS AND FAMILIES WHO ARE SURVIVORS OF DOMESTIC VIOLENCE AND HUMAN TRAFFICKING. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| SALVATION ARMY<br>832 FOLSOM STREET<br>SAN FRANCISCO, CA 94107-1123 | | PC | TO PROVIDE MEALS TO HOMELESS AND LOW-INCOME INDIVIDUALS AND FAMILIES IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| SAN DIEGO LESBIAN GAY BISEXUAL AND TRANSGENDER COMMUNITY CENTER<br>3909 CENTRE STREET<br>SAN DIEGO, CA 92103 | | PC | FOR THE ENGAGE SAN DIEGO PROJECT TO INCREASE CIVIC PARTICIPATION OF UNDERREPRESENTED GROUPS IN THE REGION. $150,000 | 150,000. |
| SAN DIEGO LESBIAN GAY BISEXUAL AND TRANSGENDER COMMUNITY CENTER<br>3909 CENTRE STREET<br>SAN DIEGO, CA 92103 | | PC | FOR THE ENGAGE SAN DIEGO PROJECT TO INCREASE CIVIC PARTICIPATION, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| SAN FRANCISCO BALLET ASSOCIATION<br>455 FRANKLIN STREET<br>SAN FRANCISCO, CA 94102-4438 | | PC | FOR GENERAL SUPPORT. $1,000 | 1,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SAN FRANCISCO BOTANICAL GARDEN SOCIETY<br>1199 9TH AVENUE<br>SAN FRANCISCO, CA 94122 | | PC | FOR GENERAL SUPPORT. | 500. |
| SAN FRANCISCO COURT APPOINTED SPECIAL ADV<br>2535 MISSION STREET<br>SAN FRANCISCO, CA 94110 | | PC | FOR GENERAL SUPPORT. | 12,500. |
| SAN FRANCISCO FOOD BANK<br>900 PENNSYLVANIA AVENUE<br>SAN FRANCISCO, CA 94107 | | PC | TO MEET THE NEEDS OF THE POOR AND DISADVANTAGED BY SUSTAINING AND INCREASING THE EFFICIENCY OF ITS FOOD DISTRIBUTION PROGRAM. $80,000 OVER TWO YEARS (2016-2018) | 40,000. |
| SAN FRANCISCO FOOD BANK<br>900 PENNSYLVANIA AVENUE<br>SAN FRANCISCO, CA 94107 | | PC | FOR GENERAL SUPPORT. | 300. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $200,000 | 200,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $260,000 | 260,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $50,000 | 50,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $85,000 | 85,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $150,000 | 150,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | TO ADVANCE RACIAL AND ECONOMIC EQUITY, IN HONOR OF IRA HIRSCHFIELD. $50,000 | 50,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR HOPE SF TO IMPROVE SCHOOL ATTENDANCE AND ACHIEVEMENT FOR STUDENTS LIVING IN PUBLIC HOUSING. $100,000 | 100,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $25,000 | 25,000. |
| SAN FRANCISCO FOUNDATION<br>ONE EMBARCADERO CENTER, SUITE 1400<br>SAN FRANCISCO, CA 94111 | | PC | FOR AN ADVISED FUND. $230,000. | 230,000. |
| SAN FRANCISCO FREE CLINIC<br>4900 CALIFORNIA STREET<br>SAN FRANCISCO, CA 94118-1115 | | PC | FOR GENERAL SUPPORT. $1,000 | 1,000. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SAN FRANCISCO MUSEUM OF MODERN ART<br>151 THIRD STREET<br>SAN FRANCISCO, CA 94103-3107 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| SAN FRANCISCO PLANNING AND URBAN RESEARCH ASSOCIATION<br>654 MISSION STREET<br>SAN FRANCISCO, CA 94105 | | PC | FOR THE SILVER SPUR AWARDS. $5,000 | 5,000. |
| SAN FRANCISCO STATE UNIVERSITY FOUNDATION<br>1600 HOLLOWAY AVENUE ADMINISTRATION ROOM<br>154D SAN FRANCISCO, CA 94132 | | PC | FOR THE FUNDING THE NEXT GENERATION CONFERENCE TO INCREASE PUBLIC AWARENESS ABOUT THE NEED FOR LOCAL INVESTMENTS IN CHILDREN. $10,000 | 10,000. |
| SAN FRANCISCO STUDY CENTER<br>1663 MISSION STREET, SUITE 310<br>SAN FRANCISCO, CA 94103 | | PC | FOR PLANNING THE EXPANSION OF SAN FRANCISCO BEACON CENTERS AND IMPROVING PROGRAM QUALITY. $90,000 | 90,000. |
| SAN FRANCISCO STUDY CENTER<br>1663 MISSION STREET, SUITE 310<br>SAN FRANCISCO, CA 94103 | | PC | FOR THE SAN FRANCISCO BEACON INITIATIVE. $25,000 | 25,000. |
| SAN FRANCISCO SYMPHONY<br>DAVIES SYMPHONY HALL 201 VAN NESS AVENUE<br>SAN FRANCISCO, CA 94102-4585 | | PC | FOR GENERAL SUPPORT. $15,000 | 15,000. |
| SAN FRANCISCO SYMPHONY<br>DAVIES SYMPHONY HALL 201 VAN NESS AVENUE<br>SAN FRANCISCO, CA 94102-4585 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SCHWAB CHARITABLE FUND<br>211 MAIN STREET<br>SAN FRANCISCO, CA 94105 | | PC | FOR GENERAL SUPPORT. | 4,800. |
| SCOUTSEVEN<br>6536 DANA STREET<br>OAKLAND, CA 94609 | | NC | TO ENHANCE THE DISCOVER OUR MODEL SECTION OF THE WEBSITE OF THE DREAMER PROGRAM AT U.C. BERKELEY. $40,000 | 40,000. |
| SERVICES AND ADVOCACY FOR GAY, LESBIAN, BISEXUAL & TRANSGENDER ELDERS<br>305 SEVENTH AVENUE, 6TH FLOOR<br>NEW YORK, NY 10001 | | PC | TO ENGAGE OLDER LGBT PEOPLE IN EFFORTS TO EDUCATE THE PUBLIC ABOUT THE HARMS CAUSED BY ANTI-GAY DISCRIMINATION. $175,000 OVER TWO YEARS (2016-2018) | 100,000. |
| SERVICES AND ADVOCACY FOR GAY, LESBIAN, BISEXUAL & TRANSGENDER ELDERS<br>305 SEVENTH AVENUE, 6TH FLOOR<br>NEW YORK, NY 10001 | | PC | FOR A JOURNAL AD FOR THE SAGE AWARDS HONORING TWO HJF GRANTEE LEADERS. $1,250 | 1,250. |
| SERVICES, IMMIGRANT RIGHTS AND EDUCATION NETWORK<br>1415 KOLL CIRCLE, SUITE 108<br>SAN JOSE, CA 95112 | | PC | TO STRENGTHEN ITS BOARD AND FUNDRAISING CULTURE. $64,000 | 64,000. |
| SERVICES, IMMIGRANT RIGHTS AND EDUCATION NETWORK<br>1415 KOLL CIRCLE, SUITE 108<br>SAN JOSE, CA 95112 | | PC | TO INCREASE CITIZENSHIP AND IMMIGRANT CIVIC ENGAGEMENT IN THE SOUTH BAY. $85,000 | 85,000. |
| SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT<br>1321 GARDEN HIGHWAY, SUITE 210<br>SACRAMENTO, CA 95833 | | PC | FOR MEMBERSHIP IN CALIFORNIA EXECUTIVES' ALLIANCE, A FOUNDATION CONSORTIUM AIMED AT EXPANDING OPPORTUNITIES FOR BOYS AND MEN OF COLOR. $25,000 | 25,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT<br>1321 GARDEN HIGHWAY, SUITE 210<br>SACRAMENTO, CA 95833 | | PC | TO INCREASE IMMIGRANT CIVIC ENGAGEMENT IN FRESNO COUNTY. $100,000 | 100,000. |
| SMALL BUSINESS MAJORITY FOUNDATION, INC.<br>4000 BRIDGEWAY, SUITE 305<br>SAUSALITO, CA 94965 | | PC | TO BRING THE VOICES OF THE SMALL BUSINESS COMMUNITY TO THE DEBATE ABOUT RELIGIOUS LIBERTY EXEMPTIONS. $125,000 | 75,000. |
| SMALL BUSINESS MAJORITY FOUNDATION, INC.<br>4000 BRIDGEWAY, SUITE 305<br>SAUSALITO, CA 94965 | | PC | TO AMPLIFY THE VOICES OF SMALL BUSINESS OWNERS IN DEBATES AROUND THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $125,000 | 125,000. |
| SOCIETY OF ST. VINCENT DE PAUL OF ALAMEDA COUNTY<br>9235 SAN LEANDRO STREET<br>OAKLAND, CA 94603 | | PC | FOR THE FREE FOOD DINING ROOM AND FOOD LOCKER PROGRAMS TO PROVIDE FOOD ASSISTANCE TO THE POOR AND HOMELESS IN ALAMEDA COUNTY. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| SOUTHERN POVERTY LAW CENTER<br>400 WASHINGTON AVENUE<br>MONTGOMERY, AL 36104 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| SPANISH-SPEAKING UNITY COUNCIL OF ALAMEDA COUNTY<br>1900 FRUITVALE, 2ND FL<br>OAKLAND, CA 94601 | | PC | FOR STRATEGIC PLANNING AND LEADERSHIP DEVELOPMENT. $10,000 | 10,000. |
| SPARK SF PUBLIC SCHOOLS<br>555 FRANKLIN STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE INAUGURAL GALA OF SPARK SF PUBLIC SCHOOLS. $10,000 | 10,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SPARK SF PUBLIC SCHOOLS<br>555 FRANKLIN STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR SFUSD TO BOLSTER STUDENT ACHIEVEMENT BY IMPROVING ITS ENGLISH LANGUAGE ARTS PROGRAM. $35,000 | 35,000. |
| SPARK SF PUBLIC SCHOOLS<br>555 FRANKLIN STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR LEADING DISTRICT-LEVEL CHANGES AND FOR CLOSING THE ACHIEVEMENT GAP, INCLUDING PRE K-3RD ALIGNMENT | 845,000. |
| SPITFIRE STRATEGIES, LLC<br>1800 M STREET, NW, SUITE 300<br>WASHINGTON, DC 20036 | | NC | TO SUPPORT EXECUTIVE-LEVEL STRATEGIC COMMUNICATIONS TRAINING AND COACHING. $42,000 | 42,000. |
| SPITFIRE STRATEGIES, LLC<br>1800 M STREET, NW, SUITE 300<br>WASHINGTON, DC 20036 | | NC | TO SUPPORT EXECUTIVE-LEVEL STRATEGIC COMMUNICATIONS TRAINING AND COACHING. $84,000 | 20,000. |
| ST. ANTHONY FOUNDATION<br>150 GOLDEN GATE AVENUE<br>SAN FRANCISCO, CA 94102-3899 | | PC | FOR ST. ANTHONY'S DINING ROOM, TO PROVIDE DAILY MEALS TO HOMELESS AND LOW-INCOME RESIDENTS OF SAN FRANCISCO, $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| ST. ANTHONY FOUNDATION<br>150 GOLDEN GATE AVENUE<br>SAN FRANCISCO, CA 94102-3899 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| ST. JOSEPH'S SOCIETY<br>P.O. BOX 1468<br>CHEYENNE, WY 82003 | | PC | FOR THE RETIRED PRIESTS FUND, IN MEMORY OF JIM FOREMAN. $250 | 250. |
| | | | | |

**Total from continuation sheets** ..........

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| ST. MARY'S CENTER<br>925 BROCKHURST STREET<br>OAKLAND, CA 94608 | | PC | TO SUPPORT AN EMERGENCY SHELTER FOR SENIORS AND A MEAL PROGRAM FOR HOMELESS AND LOW-INCOME SENIORS, CHILDREN AND FAMILIES. $15,000 OVER TWO YEARS (2015-2017) | 7,500. |
| STANFORD GRADUATE SCHOOL OF BUSINESS<br>655 KNIGHT WAY<br>STANFORD, CA 94305 | | PC | FOR GENERAL SUPPORT. | 5,000. |
| STANFORD HOSPITAL & CLINICS<br>326 GALVEZ STREET<br>STANFORD, CA 94305-6105 | | PC | TO BUILD A NEW STATE-OF-THE-ART STANFORD HOSPITAL. $600,000 OVER 5 YEARS (2012-2017) | 120,000. |
| STANFORD HOSPITAL & CLINICS<br>326 GALVEZ STREET<br>STANFORD, CA 94305-6105 | | PC | FOR GENERAL SUPPORT. | 20,000. |
| STANFORD UNIVERSITY BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY<br>340 PANAMA STREET<br>STANFORD, CA 94305 | | PC | TO EVALUATE A MULTILINGUAL PRESCHOOL TEXTING PROGRAM TO IMPROVE ITS EFFECTIVENESS IN INCREASING PARENT ENGAGEMENT AND STUDENT LEARNING. $200,000 OVER TWO YEARS (2016-2018) | 150,000. |
| STERN GROVE FESTIVAL ASSOCIATION<br>832 FOLSOM STREET, SUITE 1000<br>SAN FRANCISCO, CA 94107 | | PC | FOR GENERAL SUPPORT. $15,000 | 15,000. |
| STERN GROVE FESTIVAL ASSOCIATION<br>832 FOLSOM STREET, SUITE 1000<br>SAN FRANCISCO, CA 94107 | | PC | FOR GENERAL SUPPORT. $1,500 | 1,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| SWORDS TO PLOWSHARES VETERANS RIGHTS ORGANIZATION<br>1060 HOWARD STREET<br>SAN FRANCISCO, CA 94103 | | PC | TO PROVIDE EMERGENCY FOOD AND SHELTER SUPPORT FOR HOMELESS VETERANS IN SAN FRANCISCO. $10,000 OVER TWO YEARS (2015-2017) | 5,000. |
| SWORDS TO PLOWSHARES VETERANS RIGHTS ORGANIZATION<br>1060 HOWARD STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| T.O.T.A.<br>P.O. BOX 643<br>LAFAYETTE, CA 94549 | | PC | FOR THE MR. ANTHONY PROGRAM TO DELIVER EMERGENCY FOOD BOXES TO LOW-INCOME AND HOMELESS FAMILIES IN ALAMEDA AND CONTRA COSTA COUNTIES. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| TANDEM, PARTNERS IN EARLY LEARNING<br>1275 FAIRFAX AVENUE, SUITE 201<br>SAN FRANCISCO, CA 94124 | | PC | TO EVALUATE AND REFINE A PROGRAM THAT PROMOTES EARLY LITERACY IN THE HOMES OF THE MOST UNDERSERVED SAN FRANCISCO COMMUNITIES. $100,000 | 100,000. |
| TANDEM, PARTNERS IN EARLY LEARNING<br>1275 FAIRFAX AVENUE, SUITE 201<br>SAN FRANCISCO, CA 94124 | | PC | TO PROMOTE EARLY LITERACY IN THE HOMES OF THE MOST UNDERSERVED SAN FRANCISCO COMMUNITIES. $100,000 | 100,000. |
| TEACHING CHANNEL<br>2 EMBARCADERO CENTER, FLOOR 8<br>SAN FRANCISCO, CA 94111 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION<br>201 EDDY STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR ITS 35TH ANNIVERSARY. $350 | 350. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| THE LATINO COMMUNITY FOUNDATION<br>235 MONTGOMERY STREET, #1160<br>SAN FRANCISCO, CA 94104 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| THE NATURE CONSERVANCY<br>201 MISSION STREET, # 4<br>SAN FRANCISCO, CA 94105 | | PC | FOR GENERAL SUPPORT. | 600. |
| THE SAN FRANCISCO PARTICULAR COUNCIL OF<br>THE SOCIETY OF ST. VINCENT DE PAUL<br>1175 HOWARD STREET<br>SAN FRANCISCO, CA 94103 | | PC | TO PROVIDE EMERGENCY HOUSING TO HOMELESS MEN AND WOMEN AND SURVIVORS OF DOMESTIC VIOLENCE. $25,000 OVER TWO YEARS (2015-2017) | 12,500. |
| THE SAN FRANCISCO PARTICULAR COUNCIL OF<br>THE SOCIETY OF ST. VINCENT DE PAUL<br>1175 HOWARD STREET<br>SAN FRANCISCO, CA 94103 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| THE SERRA PRESCHOOL<br>7 FUNSTON AVENUE<br>SAN FRANCISCO, CA 94129 | | PC | FOR GENERAL SUPPORT. | 3,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | FOR THE FLEXIBLE LEADERSHIP INVESTMENTS PROJECT TO INCREASE CIVIC PARTICIPATION IN TRADITIONALLY UNDERREPRESENTED COMMUNITIES IN ORANGE COUNTY. $200,000 OVER TWO YEARS (2015-2017) | 100,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | TO SUPPORT THE FLEXIBLE LEADERSHIP AWARDS PROGRAM AND ADVANCE FIELD KNOWLEDGE. $800,000 | 177,500. |
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| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | TO SUPPORT THE FLEXIBLE LEADERSHIP AWARDS PROGRAM AND LAUNCH A FUNDRAISING INITIATIVE. ($1,250,000) | 1,250,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | FOR THE NATIONAL AIDS MEMORIAL GROVE, IN HONOR OF IRA HIRSCHFIELD. $10,000 | 10,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | FOR THE HAAS LEADERSHIP INITIATIVES PROJECT TO INCREASE CIVIC PARTICIPATION IN TRADITIONALLY UNDERREPRESENTED COMMUNITIES IN ORANGE COUNTY. $125,000 | 125,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | FOR THE IN-KIND PROVISION OF OFFICE SPACE FOR THE FLEXIBLE LEADERSHIP INVESTMENTS PROJECT. $15,993 | 15,993. |
| TIDES FOUNDATION<br>THE PRESIDIO P.O. BOX 29903<br>SAN FRANCISCO, CA 94129-0903 | | PC | TO SUPPORT THE ALLIANCE FOR CITIZENSHIP IN COORDINATING NATIONAL COMMUNICATIONS AND MESSAGING. $75,000 | 75,000. |
| TRANSGENDER LAW CENTER<br>P.O. BOX 70976<br>OAKLAND, CA 94612 | | PC | TO SECURE NONDISCRIMINATION PROTECTIONS FOR GAY AND TRANSGENDER PEOPLE THROUGH LITIGATION AND POLICY ADVOCACY. $100,000 OVER TWO YEARS (2016-2018) | 75,000. |
| TRANSGENDER LAW CENTER<br>P.O. BOX 70976<br>OAKLAND, CA 94612 | | PC | TO STRENGTHEN THE SENIOR TEAM AND BUILD AN INCLUSIVE CULTURE. $58,000 | 58,000. |
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| **Total from continuation sheets** | | | | |

FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| TRANSGENDER LAW CENTER<br>P.O. BOX 70976<br>OAKLAND, CA 94612 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD.<br>$10,000 | 10,000. |
| TREVOR PROJECT, INC.<br>P.O. BOX 69232<br>WEST HOLLYWOOD, CA 90069 | | PC | IN HONOR OF TYLER DEATON OF AMERICAN UNITY FUND.<br>$1,000 | 1,000. |
| TRI-CITY VOLUNTEERS INC<br>37350 JOSEPH STREET<br>FREMONT, CA 94536 | | PC | TO PROVIDE FOOD TO LOW-INCOME AND HOMELESS FAMILIES<br>LIVING IN FREMONT, NEWARK AND UNION CITY. $25,000<br>OVER TWO YEARS (2015-2017) | 12,500. |
| TRUSTEES OF COLUMBIA UNIVERSITY IN THE<br>CITY OF NEW YORK<br>435 WEST 116 STREET<br>NEW YORK, NY 10027 | | PC | FOR THE WHAT WE KNOW PROJECT, TO ANALYZE AND<br>DISSEMINATE AUTHORITATIVE RESEARCH ABOUT THE HARMS<br>CAUSED BY ANTI-GAY DISCRIMINATION. $25,000 | 25,000. |
| TRUSTEES OF COLUMBIA UNIVERSITY IN THE<br>CITY OF NEW YORK<br>435 WEST 116 STREET<br>NEW YORK, NY 10027 | | PC | TO HELP SHAPE PUBLIC DEBATES AROUND PROTECTING<br>RELIGIOUS LIBERTIES AND OTHER FUNDAMENTAL RIGHTS.<br>$25,000 | 25,000. |
| UC BERKELEY FOUNDATION<br>CAMPANILE WAY<br>BERKELEY, CA 94701 | | PC | FOR GENERAL SUPPORT. | 18,000. |
| UC HASTINGS LA RAZA LAW STUDENTS ASSOC<br>200 MCALLISTER STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR GENERAL SUPPORT. | 2,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| UCSF<br>505 PARNASSUS AVENUE<br>SAN FRANCISCO, CA 94143 | | PC | FOR GENERAL SUPPORT. | 1,000. |
| UFW FOUNDATION<br>3002 WHITTIER BOULEVARD<br>LOS ANGELES, CA 90023 | | PC | TO EDUCATE FARMWORKERS AND THEIR FAMILIES ABOUT IMMIGRATION POLICIES AND TO INCREASE THEIR CIVIC PARTICIPATION. $100,000 (OVER TWO YEARS) | 50,000. |
| UFW FOUNDATION<br>3002 WHITTIER BOULEVARD<br>LOS ANGELES, CA 90023 | | PC | TO DEVELOP AND ALIGN THE STAFF AND BOARD BEHIND A LONG-TERM STRATEGIC PLAN. $57,000 | 57,000. |
| UNITED WAY OF THE BAY AREA<br>550 KEARNEY STREET, SUITE 1000<br>SAN FRANCISCO, CA 94108 | | PC | FOR THE BAY AREA COMMUNITY FUND. $20,000 | 20,000. |
| UNITED WE DREAM NETWORK<br>1900 L STREET NW, SUITE 900<br>WASHINGTON, DC 20036 | | PC | TO EDUCATE THE PUBLIC ABOUT THE NEEDS OF UNDOCUMENTED YOUTH AND THEIR FAMILIES. $200,000 OVER TWO YEARS (2015-2017) | 100,000. |
| UNITED WE DREAM NETWORK<br>1900 L STREET NW, SUITE 900<br>WASHINGTON, DC 20036 | | PC | FOR GENERAL SUPPORT, IN HONOR OF IRA HIRSCHFIELD. $25,000 | 25,000. |
| UNITED WE DREAM NETWORK<br>1900 L STREET NW, SUITE 900<br>WASHINGTON, DC 20036 | | PC | TO EDUCATE THE PUBLIC ABOUT THE NEEDS OF UNDOCUMENTED YOUTH AND THEIR FAMILIES. $200,000 | 100,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| UNIVERSITY OF CALIFORNIA BERKELEY, FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | TO PROVIDE EMERGENCY FOOD TO ALL UC BERKELEY STUDENTS IN NEED. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| UNIVERSITY OF CALIFORNIA, BERKELEY FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | FOR THE INITIATIVE FOR EQUITY, DIVERSITY AND INCLUSION, A COMPREHENSIVE EFFORT TO CREATE A MORE EQUITABLE, DIVERSE AND INCLUSIVE UNIVERSITY. $16,000,000 OVER FIVE YEARS | 758,000. |
| UNIVERSITY OF CALIFORNIA, BERKELEY FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | TO ESTABLISH "HAAS DREAMER" SCHOLARSHIPS TO HELP QUALIFIED BERKELEY "DREAM" STUDENTS OFFSET THE DISPARITIES THEY FACE DUE TO THEIR IMMIGRATION STATUS. $1 MILLION OVER FIVE YEARS (2012-2017) | 200,000. |
| UNIVERSITY OF CALIFORNIA, BERKELEY FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | FOR THE I. MICHAEL HEYMAN ENDOWED CHAIR IN LAW. $50,000 OVER FIVE YEARS (2015-2020) | 10,000. |
| UNIVERSITY OF CALIFORNIA, BERKELEY FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | TO MAINTAIN THE DREAMER WEBSITE PORTAL. $20,000 | 20,000. |
| UNIVERSITY OF CALIFORNIA, BERKELEY FOUNDATION<br>2080 ADDISON STREET<br>BERKELEY, CA 94720-4200 | | PC | FOR THE UNDOCUMENTED STUDENT PROGRAMS, IN HONOR OF IRA HIRSCHFIELD. $50,000 | 50,000. |
| UNIVERSITY OF SAN FRANCISCO<br>2130 FULTON STREET<br>SAN FRANCISCO, CA 94117-1080 | | PC | FOR GENERAL SUPPORT. | 5,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| UNIVERSITY OF SOUTHERN CALIFORNIA<br>3620 S. VERMONT AVENUE, KAP 462<br>LOS ANGELES, CA 90089-0255 | | PC | TO PROVIDE RESEARCH AND POLICY ANALYSIS TO THE GOVERNORS OFFICE TO ADVANCE STATEWIDE IMMIGRANT INTEGRATION. $75,000 | 75,000. |
| URBAN SCHOOL OF SAN FRANCISCO<br>1563 PAGE STREET<br>SAN FRANCISCO, CA 94117 | | PC | FOR GENERAL SUPPORT. | 700. |
| VANGUARD CHARITABLE<br>P.O. BOX 9509<br>WARWICK, RI 02889-9509 | | PC | FOR GENERAL SUPPORT. | 10,000. |
| WHEATON COLLEGE<br>26 EAST MAIN STREET<br>NORTON, MA 02766-2322 | | PC | FOR GENERAL SUPPORT. $5,000 | 5,000. |
| WOMEN'S DAYTIME DROP-IN CENTER<br>2218 ACTON STREET<br>BERKELEY, CA 94702 | | PC | TO PROVIDE MEALS TO HOMELESS WOMEN AND CHILDREN IN BERKELEY. $10,000 OVER TWO YEARS (2015-2017) | 5,000. |
| WOMEN'S FOUNDATION OF CALIFORNIA<br>300 FRANK OGAWA PLAZA, SUITE 420<br>OAKLAND, CA 94612 | | PC | TO INCREASE IMMIGRANT CIVIC ENGAGEMENT IN THE INLAND EMPIRE. $200,000 OVER TWO YEARS (2015-2017) | 80,000. |
| YMCA OF SAN FRANCISCO<br>63 FUNSTON AVE<br>SAN FRANCISCO, CA 94129 | | PC | FOR GENERAL SUPPORT. | 500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| YOSEMITE CONSERVANCY<br>101 MONTGOMERY STREET, SUITE 1700<br>SAN FRANCISCO, CA 94104 | | PC | FOR GENERAL SUPPORT. | 500. |
| YOSEMITE FOUNDATION<br>101 MONTGOMERY STREET, SUITE 1700<br>SAN FRANCISCO, CA 94104 | | PC | FOR GENERAL SUPPORT. $250 | 250. |
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| **Total from continuation sheets** | | | | |

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**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| ABODE SERVICES<br>40849 FREMONT BOULEVARD<br>FREMONT, CA 94538 | | PC | FOR THE SUNRISE VILLAGE EMERGENCY SHELTER TO PROVIDE HOUSING TO HOMELESS INDIVIDUALS AND FAMILIES IN FREMONT, NEWARK, UNION CITY AND HAYWARD. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| ALAMEDA EMERGENCY FOOD<br>P.O. BOX 2167<br>ALAMEDA, CA 94501-0214 | | PC | TO SUPPORT A FOOD DISTRIBUTION CENTER FOR LOW-INCOME RESIDENTS IN THE CITY OF ALAMEDA. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| ASIAN AMERICANS ADVANCING JUSTICE, LOS ANGELES<br>1145 WILSHIRE BOULEVARD<br>LOS ANGELES, CA 90017 | | PC | TO BUILD A STRONG ASIAN AMERICAN PACIFIC ISLANDER VOICE ON STATE POLICIES IMPACTING IMMIGRANT COMMUNITIES. $150,000 OVER TWO YEARS | 75,000. |
| BAY AREA WOMEN'S AND CHILDREN'S CENTER<br>318 LEAVENWORTH STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR ONGOING SUPPORT AND EXPANDED PROGRAMS FOR TENDERLOIN WOMEN, CHILDREN AND FAMILIES. $40,000 OVER TWO YEARS (2016-2018) | 15,000. |
| BERKELEY FOOD & HOUSING PROJECT<br>1901 FAIRVIEW STREET<br>BERKELEY, CA 94703 | | PC | TO PROVIDE EMERGENCY FOOD AND SHELTER FOR HOMELESS MEN, WOMEN AND CHILDREN IN BERKELEY. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| BOARD OF TRUSTEES OF THE GLIDE FOUNDATION<br>330 ELLIS STREET<br>SAN FRANCISCO, CA 94102 | | PC | FOR THE DAILY FREE MEALS PROGRAM TO PROVIDE HOT MEALS TO LOW-INCOME AND HOMELESS INDIVIDUALS IN SAN FRANCISCO'S TENDERLOIN NEIGHBORHOOD. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| BUILDING OPPORTUNITIES FOR SELF-SUFFICIENCY<br>1918 UNIVERSITY AVENUE #2A<br>BERKELEY, CA 94704 | | PC | TO PROVIDE EMERGENCY SHELTER AND MEALS FOR HOMELESS AND VERY LOW-INCOME INDIVIDUALS AND FAMILIES IN THE EAST BAY. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
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| **Total from continuation sheets** | | | | 11,838,725. |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| CALIFORNIA BUDGET AND POLICY CENTER<br>1107 9TH STREET, SUITE 310<br>SACRAMENTO, CA 95814 | | PC | TO ANALYZE HOW STATE BUDGET PROPOSALS AFFECT THE EDUCATION OF LOW- AND MIDDLE-INCOME STUDENTS IN CALIFORNIA AND TO EXPAND ANALYSIS OF LOCAL EDUCATION FUNDING. $75,000 OVER TWO YEARS (2016-2018) | 30,000. |
| CATHOLIC CHARITIES CYO OF THE ARCHDIOCESE OF SAN FRANCISCO<br>990 EDDY STREET<br>SAN FRANCISCO, CA 94109 | | PC | TO SUPPORT ST. JOSEPHS FAMILY CENTER, A SHELTER FOR HOMELESS FAMILIES IN SAN FRANCISCO. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| COACHING CORPS<br>310 EIGHTH STREET, SUITE 300<br>OAKLAND, CA 94607 | | PC | TO SCALE THE PROGRAM'S REACH AND IMPACT. $5,800,000 OVER FIVE YEARS (2017-2021) | 5,750,000. |
| COALITION FOR HUMANE IMMIGRANT RIGHTS OF LOS ANGELES<br>2533 W. THIRD STREET, SUITE 101<br>LOS ANGELES, CA 90057 | | PC | TO ADVANCE IMMIGRANT RIGHTS AND INTEGRATION IN LOS ANGELES COUNTY AND BEYOND. $250,000 (OVER TWO YEARS) | 125,000. |
| COMMUNITY AWARENESS & TREATMENT SERVICES, INC.<br>1171 MISSION STREET, 2ND FLOOR<br>SAN FRANCISCO, CA 94103 | | PC | TO SUPPORT A WOMAN'S PLACE, A 24-HOUR EMERGENCY SHELTER FOR HOMELESS WOMEN WITH SPECIAL NEEDS. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| DEFINE AMERICAN<br>45 W 36TH STREET, 6TH FLOOR<br>NEW YORK, NY 10018 | | PC | TO HELP CHANGE NATIONAL DIALOGUE ABOUT IMMIGRANTS AND ENLIST NEW ALLIES IN THE MOVEMENT FOR REFORM. $200,000 OVER TWO YEARS (2016-2018) | 100,000. |
| DOLORES STREET COMMUNITY SERVICES, INC.<br>938 VALENCIA STREET<br>SAN FRANCISCO, CA 94110 | | PC | FOR THE DOLORES SHELTER PROGRAM TO PROVIDE MEALS AND EMERGENCY SHELTER FOR HOMELESS ADULTS IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| DOROTHY DAY HOUSE<br>CATHOLIC WORKER OF BERKELEY P. O. BOX 12701<br>BERKELEY, CA 94712 | | PC | TO PROVIDE EMERGENCY FOOD AND SHELTER TO HOMELESS AND LOW-INCOME RESIDENTS OF BERKELEY. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| EDSOURCE INC.<br>436 14TH STREET, SUITE 1005<br>OAKLAND, CA 94612 | | PC | TO PROVIDE NEWS ANALYSES OF KEY EDUCATION REFORM ISSUES IN CALIFORNIA. $85,000 OVER TWO YEARS (2016-2018) | 42,500. |
| EPISCOPAL COMMUNITY SERVICES OF SAN FRANCISCO<br>165 EIGHTH STREET, 3RD FLOOR<br>SAN FRANCISCO, CA 94103 | | PC | TO SUPPORT EMERGENCY SHELTERS FOR HOMELESS INDIVIDUALS IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| EQUALITY ALLIANCE OF SAN DIEGO COUNTY<br>P.O. BOX 12266<br>SAN DIEGO, CA 92112-3266 | | PC | TO PROMOTE IMMIGRANT RIGHTS AND CIVIC PARTICIPATION IN SAN DIEGO COUNTY. $200,000 OVER TWO YEARS (2016-2018) | 100,000. |
| EQUALITY NORTH CAROLINA FOUNDATION<br>P.O. BOX 28768<br>RALEIGH, NC 27611 | | PC | TO ENGAGE PEOPLE OF FAITH IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| FAMILY EMERGENCY SHELTER COALITION<br>21455 BIRCH STREET, #5<br>HAYWARD, CA 94541 | | PC | FOR LES MARQUIS HOUSE TO PROVIDE EMERGENCY SHELTER AND FOOD TO HOMELESS FAMILIES IN ALAMEDA COUNTY. $15,000 OVER TWO YEARS (2016-2018) | 7,500. |
| FARMWORKER JUSTICE FUND, INC.<br>1126 16TH STREET, NW, SUITE 270<br>WASHINGTON, DC 20036 | | PC | TO IMPROVE LIVING CONDITIONS, WORKING CONDITIONS AND LEGAL STATUS FOR FARMWORKERS AND THEIR FAMILIES. $150,000 OVER TWO YEARS (2016-2018) | 75,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| FOOD RUNNERS<br>2579 WASHINGTON STREET<br>SAN FRANCISCO, CA 94115 | | PC | TO PICK UP AND DELIVER SALVAGED FOOD TO SAN FRANCISCO SHELTERS AND FOOD PROGRAMS. $50,000 OVER TWO YEARS (2016-2018) | 25,000. |
| FOUNDATION CENTER<br>312 SUTTER STREET, SUITE 606<br>SAN FRANCISCO, CA 94108-4323 | | PC | TO HELP THE PUBLIC FIND INFORMATION ON GRANT RESOURCES. $15,000 OVER TWO YEARS (2016-2018) | 7,500. |
| FREEDOM FOR ALL AMERICANS EDUCATION FUND<br>1775 PENNSYLVANIA AVENUE, NW, STE 350<br>WASHINGTON, DC 20006 | | PC | TO PARTNER WITH THE NATIONAL LGBTQ TASK FORCE IN SUPPORTING FAITH ORGANIZING IN HIGH PRIORITY STATES. $200,000 | 100,000. |
| FUNDERS FOR LGBTQ ISSUES<br>104 W. 29TH STREET, 4TH FLOOR<br>NEW YORK, NY 10001 | | PC | TO INCREASE PHILANTHROPIC GIVING TO THE GAY COMMUNITY. $90,000 OVER TWO YEARS (2016-2018) | 40,000. |
| GEORGETOWN UNIVERSITY<br>37TH AND O STREETS, NW<br>WASHINGTON, DC 20057 | | PC | FOR THE CENTER FOR LAW AND SOCIAL CHANGE TO SHARE WITH OTHER SOCIAL JUSTICE MOVEMENTS LESSONS THAT WERE LEARNED IN THE STRUGGLE TO ACHIEVE MARRIAGE EQUALITY. $300,000 OVER TWO YEARS (2016-2018) | 150,000. |
| GRANTMAKERS CONCERNED WITH IMMIGRANTS AND REFUGEES<br>P.O. BOX 1100<br>SEBASTOPOL, CA 95473-1100 | | PC | TO INCREASE PHILANTHROPIC SUPPORT FOR IMMIGRANT INTEGRATION IN CALIFORNIA AND NATIONALLY AND TO SUPPORT THE 2018 NATIONAL CONVENING IN LOS ANGELES. $205,000 OVER TWO YEARS (2014-2016) | 115,000. |
| GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS<br>1725 DESALES STREET, NW, SUITE 404<br>WASHINGTON, DC 20036 | | PC | TO HELP FOUNDATIONS ADOPT BEST PRACTICES IN GRANTMAKING, INCLUDING PRIORITIZING LEADERSHIP DEVELOPMENT. $140,000 OVER TWO YEARS (2016-2018) | 50,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| HOMELESS PRENATAL PROGRAM<br>2500 18TH STREET<br>SAN FRANCISCO, CA 94110 | | PC | TO PROVIDE EMERGENCY FOOD AND REFERRALS FOR EMERGENCY SHELTER FOR HOMELESS MOTHERS, PREGNANT WOMEN AND THEIR FAMILIES. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111 | | PC | TO IMPROVE FUNDRAISING SKILLS IN GAY ORGANIZATIONS AND TO SUPPORT LGBT EXECUTIVE DIRECTORS IN THE BAY AREA. $160,000 | 9,725. |
| IMMIGRANT LEGAL RESOURCE CENTER<br>1663 MISSION STREET, SUITE 602<br>SAN FRANCISCO, CA 94103 | | PC | TO INCREASE CITIZENSHIP IN CALIFORNIA AND NATIONALLY THROUGH THE NEW AMERICANS CAMPAIGN PROJECT. $1,110,000 OVER TWO YEARS (2016-2018) | 530,000. |
| JEWISH COMMUNITY FEDERATION OF SAN FRANCISCO, THE PENINSULA, MARIN & SONOMA<br>121 STEUART STREET<br>SAN FRANCISCO, CA 94105-9926 | | PC | FOR GENERAL SUPPORT. $175,000 OVER TWO YEARS (2016-2018) | 75,000. |
| JEWISH HOME AND SENIOR LIVING FOUNDATION<br>302 SILVER AVENUE<br>SAN FRANCISCO, CA 94112-1596 | | PC | TO SUPPORT THE JEWISH HOME'S CAPITAL CAMPAIGN. $250,000 OVER FIVE YEARS (2016-2020) | 200,000. |
| MANY VOICES<br>3133 DUMBARTON STREET, NW<br>WASHINGTON, DC 20007 | | PC | TO ENGAGE AFRICAN AMERICAN CLERGY IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| MOBILIZE THE IMMIGRANT VOTE<br>436 14TH STREET, 5TH FLOOR<br>OAKLAND, CA 94612 | | PC | TO INCREASE IMMIGRANT CIVIC PARTICIPATION THROUGHOUT CALIFORNIA. $150,000 OVER TWO YEARS (2016-2018) | 75,000. |
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| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| MORE LIGHT PRESBYTERIANS<br>4737 COUNTY ROAD 101, PMB #246<br>MINNETONKA, MN 55345-2634 | | PC | TO ENGAGE PRESBYTERIAN CLERGY AND CONGREGATIONS IN EDUCATING NORTH CAROLINIANS ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| NATIONAL CENTER FOR FAMILY PHILANTHROPY<br>1667 K STREET, SUITE 550<br>WASHINGTON, DC 20006 | | PC | FOR GENERAL SUPPORT. $60,000 OVER TWO YEARS (2016-2018) | 30,000. |
| NATIONAL IMMIGRATION FORUM<br>50 F STREET NW, SUITE 300<br>WASHINGTON, DC 20001 | | PC | TO AMPLIFY FAITH, BUSINESS, AND LAW ENFORCEMENT VOICES IN SUPPORT OF IMMIGRANT RIGHTS. $175,000 | 125,000. |
| NATIONAL IMMIGRATION LAW CENTER<br>3435 WILSHIRE BOULEVARD, SUITE 1600<br>LOS ANGELES, CA 90010 | | PC | TO DEFEND AND ADVANCE THE RIGHTS OF LOW-INCOME IMMIGRANTS AND THEIR FAMILIES. $300,000 OVER TWO YEARS (2016-2018) | 125,000. |
| NATIONAL KOREAN AMERICAN SERVICE & EDUCATION CONSORTIUM, INC.<br>900 S CRENSHAW BOULEVARD<br>LOS ANGELES, CA 90019 | | PC | TO INCREASE CIVIC PARTICIPATION AND ELEVATE THE VOICES OF ASIAN AMERICAN IMMIGRATION POLICY DEBATES. $200,000 OVER TWO YEARS | 100,000. |
| NATIONAL LESBIAN & GAY JOURNALISTS ASSOCIATION<br>2120 L STREET, NW, SUITE 850<br>WASHINGTON, DC 20037 | | PC | TO ORGANIZE ANNUAL CONVENINGS PROVIDING GAY NEWSPAPER EDITORS AND BLOGGERS WITH IN-DEPTH INFORMATION ABOUT KEY ISSUES IN THE STRUGGLE FOR GAY EQUALITY AND IMMIGRATION REFORM. $180,000 OVER TWO YEARS (2016-2018) | 100,000. |
| NATIONAL LGBTQ TASK FORCE<br>1325 MASSACHUSETTS AVENUE NW, SUITE 600<br>WASHINGTON, DC 20005 | | PC | TO ADVANCE EQUAL RIGHTS FOR GAY PEOPLE BY BROADENING AND DIVERSIFYING THE GAY MOVEMENT'S BASE OF LEADERSHIP AND ENGAGING NON-GAY PROGRESSIVE ALLIES. $200,000 | 100,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| NATIONAL LGBTQ TASK FORCE<br>1325 MASSACHUSETTS AVENUE NW, SUITE 600<br>WASHINGTON, DC 20005 | | PC | FOR THE INSTITUTE FOR WELCOMING RESOURCES TO COORDINATE STATE-BASED AND NATIONAL EFFORTS TO AMPLIFY THE VOICES OF PEOPLE OF FAITH IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $280,000 OVER 18 MONTHS (2016-2018) | 140,000. |
| NATIONAL QUEER ASIAN PACIFIC ISLANDER ALLIANCE<br>233 FIFTH AVENUE, SUITE 4A<br>NEW YORK, NY 10016 | | PC | TO PROMOTE IMMIGRANT AND GAY RIGHTS WITHIN ASIAN AMERICAN COMMUNITIES. $130,000 OVER TWO YEARS (2016-2018) | 65,000. |
| PACIFIC INSTITUTE FOR COMMUNITY ORGANIZATIONS<br>171 SANTA ROSA AVENUE<br>OAKLAND, CA 94610 | | PC | TO ENGAGE CALIFORNIA FAITH COMMUNITIES IN ADVOCATING FOR THE RIGHTS OF IMMIGRANTS. $300,000 OVER TWO YEARS (2016-2018) | 150,000. |
| PACIFIC SCHOOL OF RELIGION<br>1798 SCENIC AVENUE<br>BERKELEY, CA 94709 | | PC | FOR THE UMOJA PROJECT TO ENGAGE AFRICAN AMERICAN CLERGY IN MICHIGAN IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT LGBT PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| PROJECT OPEN HAND<br>730 POLK STREET<br>SAN FRANCISCO, CA 94109 | | PC | TO PROVIDE MEALS AND GROCERIES TO SENIORS AND CRITICALLY ILL INDIVIDUALS IN SAN FRANCISCO AND ALAMEDA COUNTIES. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| PROTEUS FUND<br>15 RESEARCH DRIVE, SUITE B<br>AMHERST, MA 01002 | | PC | FOR THE RIGHTS, FAITH & DEMOCRACY COLLABORATIVE TO ADVANCE BASIC HUMAN RIGHTS AND AFFIRM RELIGIOUS LIBERTIES. $200,000 | 100,000. |
| PUBLIC POLICY INSTITUTE OF CALIFORNIA<br>500 WASHINGTON STREET, SUITE 600<br>SAN FRANCISCO, CA 94111 | | PC | TO FOCUS THE ATTENTION OF SCHOOL DISTRICT LEADERS ON THE ACADEMIC NEEDS OF ENGLISH LEARNERS AND LOW-INCOME STUDENTS. $75,000 OVER TWO YEARS | 37,500. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| RADIO BILINGUE, INC.<br>5005 EAST BELMONT AVENUE<br>FRESNO, CA 93727 | | PC | TO SUPPORT SPANISH-LANGUAGE PUBLIC RADIO PROGRAMMING ON IMMIGRATION POLICIES AND CIVIC PARTICIPATION IN CALIFORNIA. $100,000 OVER TWO YEARS (2016-2018) | 50,000. |
| RECONCILING MINISTRIES NETWORK<br>123 WEST MADISON STREET, SUITE 2150<br>CHICAGO, IL 60602-4511 | | PC | TO ENGAGE METHODIST CLERGY AND LAY PEOPLE IN GEORGIA IN EDUCATING THE PUBLIC ABOUT THE NEED TO PROTECT GAY PEOPLE FROM DISCRIMINATION. $250,000 OVER TWO YEARS (2016-2018) | 125,000. |
| SALVATION ARMY<br>832 FOLSOM STREET<br>SAN FRANCISCO, CA 94107-1123 | | PC | TO PROVIDE MEALS TO HOMELESS AND LOW-INCOME INDIVIDUALS AND FAMILIES IN SAN FRANCISCO. $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| SAN FRANCISCO FOOD BANK<br>900 PENNSYLVANIA AVENUE<br>SAN FRANCISCO, CA 94107 | | PC | TO MEET THE NEEDS OF THE POOR AND DISADVANTAGED BY SUSTAINING AND INCREASING THE EFFICIENCY OF ITS FOOD DISTRIBUTION PROGRAM. $80,000 OVER TWO YEARS (2016-2018) | 40,000. |
| SERVICES AND ADVOCACY FOR GAY, LESBIAN, BISEXUAL & TRANSGENDER ELDERS<br>305 SEVENTH AVENUE, 6TH FLOOR<br>NEW YORK, NY 10001 | | PC | TO ENGAGE OLDER LGBT PEOPLE IN EFFORTS TO EDUCATE THE PUBLIC ABOUT THE HARMS CAUSED BY ANTI-GAY DISCRIMINATION. $175,000 OVER TWO YEARS (2016-2018) | 75,000. |
| SOCIETY OF ST. VINCENT DE PAUL OF ALAMEDA COUNTY<br>9235 SAN LEANDRO STREET<br>OAKLAND, CA 94603 | | PC | FOR THE FREE FOOD DINING ROOM AND FOOD LOCKER PROGRAMS TO PROVIDE FOOD ASSISTANCE TO THE POOR AND HOMELESS IN ALAMEDA COUNTY. $20,000 OVER TWO YEARS (2016-2018) | 10,000. |
| SPITFIRE STRATEGIES, LLC<br>1800 M STREET, NW, SUITE 300<br>WASHINGTON, DC 20036 | | NC | TO SUPPORT EXECUTIVE-LEVEL STRATEGIC COMMUNICATIONS TRAINING AND COACHING. $84,000 | 64,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient: Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| ST. ANTHONY FOUNDATION<br>150 GOLDEN GATE AVENUE<br>SAN FRANCISCO, CA 94102-3899 | | PC | FOR ST. ANTHONY'S DINING ROOM, TO PROVIDE DAILY MEALS TO HOMELESS AND LOW-INCOME RESIDENTS OF SAN FRANCISCO, $25,000 OVER TWO YEARS (2016-2018) | 12,500. |
| STANFORD UNIVERSITY SCHOOL OF EDUCATION<br>485 LASUEN MALL<br>STANFORD, CA 94305-3096 | | PC | FOR THE POLICY ANALYSIS FOR CALIFORNIA EDUCATION (PACE) CENTER TO STUDY PREK-3 ALIGNMENT IN SAN FRANCISCO AND FRESNO. $100,000 | 100,000. |
| STANFORD UNIVERSITY BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY<br>340 PANAMA STREET<br>STANFORD, CA 94305 | | PC | TO EVALUATE A MULTILINGUAL PRESCHOOL TEXTING PROGRAM TO IMPROVE ITS EFFECTIVENESS IN INCREASING PARENT ENGAGEMENT AND STUDENT LEARNING. $200,000 OVER TWO YEARS (2016-2018) | 50,000. |
| T.O.T.A.<br>P.O. BOX 643<br>LAFAYETTE, CA 94549 | | PC | FOR THE MR. ANTHONY PROGRAM TO DELIVER EMERGENCY FOOD BOXES TO LOW-INCOME AND HOMELESS FAMILIES IN ALAMEDA AND CONTRA COSTA COUNTIES. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | TO SUPPORT THE FLEXIBLE LEADERSHIP AWARDS PROGRAM AND ADVANCE FIELD KNOWLEDGE. ($1,050,000) | 1,050,000. |
| TIDES CENTER<br>THE PRESIDIO P.O. BOX 29907<br>SAN FRANCISCO, CA 94129-0907 | | PC | TO LAUNCH THE FUND DEVELOPMENT INITIATIVE. $575,000 | 575,000. |
| TRANSGENDER LAW CENTER<br>P.O. BOX 70976<br>OAKLAND, CA 94612 | | PC | TO SECURE NONDISCRIMINATION PROTECTIONS FOR GAY AND TRANSGENDER PEOPLE THROUGH LITIGATION AND POLICY ADVOCACY. $100,000 OVER TWO YEARS (2016-2018) | 125,000. |
| | | | | |
| **Total from continuation sheets** | | | | |

# FOR PUBLIC DISCLOSURE



**Part XV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| UFW FOUNDATION<br>3002 WHITTIER BOULEVARD<br>LOS ANGELES, CA 90023 | | PC | TO EDUCATE FARMWORKERS AND THEIR FAMILIES ABOUT IMMIGRATION POLICIES AND TO INCREASE THEIR CIVIC PARTICIPATION. $100,000 (OVER TWO YEARS) | 50,000. |
| UNITED WE DREAM NETWORK<br>1900 L STREET NW, SUITE 900<br>WASHINGTON, DC 20036 | | PC | TO EDUCATE THE PUBLIC ABOUT THE NEEDS OF UNDOCUMENTED YOUTH AND THEIR FAMILIES. $200,000 | 100,000. |
| UNIVERSITY OF CALIFORNIA BERKELEY, FOUNDATION<br>STILES HALL 2400 BANCROFT WAY<br>BERKELEY, CA 94704 | | PC | TO PROVIDE EMERGENCY FOOD TO ALL UC BERKELEY STUDENTS IN NEED. $10,000 OVER TWO YEARS (2016-2018) | 5,000. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| **Total from continuation sheets** | | | | |

FOR PUBLIC DISCLOSURE

Form **2220**

Department of the Treasury
Internal Revenue Service

# Underpayment of Estimated Tax by Corporations

▶ Attach to the corporation's tax return. FORM 990-PF

▶ Information about Form 2220 and its separate instructions is at www.irs.gov/form2220.

OMB No. 1545-0123

**2016**

Name: EVELYN AND WALTER HAAS, JR. FUND

**Employer identification number**: 94-6068932

**Note:** Generally, the corporation isn't required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

## Part I Required Annual Payment

| | | | | |
|---|---|---|---|---|
| 1 | Total tax (see instructions) | | 1 | 254,351. |
| 2 a | Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 | 2a | | |
| b | Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method | 2b | | |
| c | Credit for federal tax paid on fuels (see instructions) | 2c | | |
| d | **Total.** Add lines 2a through 2c | | 2d | |
| 3 | Subtract line 2d from line 1. If the result is less than $500, **do not** complete or file this form. The corporation doesn't owe the penalty | | 3 | 254,351. |
| 4 | Enter the tax shown on the corporation's 2015 income tax return. See instructions. **Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5** | | 4 | 297,821. |
| 5 | **Required annual payment.** Enter the **smaller** of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 | | 5 | 254,351. |

## Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it doesn't owe a penalty. See instructions.

6 ☐ The corporation is using the adjusted seasonal installment method.

7 ☐ The corporation is using the annualized income installment method.

8 ☒ The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

## Part III Figuring the Underpayment

| | | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|---|
| 9 | **Installment due dates.** Enter in columns (a) through (d) the 15th day of the 4th (*Form 990-PF filers:* Use 5th month), 6th, 9th, and 12th months of the corporation's tax year | 9 | 05/15/16 | 06/15/16 | 09/15/16 | 12/15/16 |
| 10 | **Required installments.** If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column. | 10 | 63,588. | 63,588. | 63,587. | 63,588. |
| 11 | Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions | 11 | 327,046. | 200,000. | 200,000. | |
| | *Complete lines 12 through 18 of one column before going to the next column.* | | | | | |
| 12 | Enter amount, if any, from line 18 of the preceding column | 12 | | 263,458. | 399,870. | 536,283. |
| 13 | Add lines 11 and 12 | 13 | | 463,458. | 599,870. | 536,283. |
| 14 | Add amounts on lines 16 and 17 of the preceding column | 14 | | | | |
| 15 | Subtract line 14 from line 13. If zero or less, enter -0- | 15 | 327,046. | 463,458. | 599,870. | 536,283. |
| 16 | If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0- | 16 | | 0. | 0. | |
| 17 | **Underpayment.** If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 | 17 | | | | |
| 18 | **Overpayment.** If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column | 18 | 263,458. | 399,870. | 536,283. | |

*Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.*

## Part IV Figuring the Penalty

| | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| 19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. *(C Corporations with tax years ending June 30 and S corporations:* Use 3rd month instead of 4th month. *Form 990-PF and Form 990-T filers:* Use 5th month instead of 4th month.) See instructions | 19 | | | | |
| 20 Number of days from due date of installment on line 9 to the date shown on line 19 | 20 | | | | |
| 21 Number of days on line 20 after 4/15/2016 and before 7/1/2016 | 21 | | | | |
| 22 Underpayment on line 17 x Number of days on line 21 / 366 x 4% (0.04) | 22 | $ | $ | $ | $ |
| 23 Number of days on line 20 after 06/30/2016 and before 10/1/2016 | 23 | | | | |
| 24 Underpayment on line 17 x Number of days on line 23 / 366 x 4% (0.04) | 24 | $ | $ | $ | $ |
| 25 Number of days on line 20 after 9/30/2016 and before 1/1/2017 | 25 | | | | |
| 26 Underpayment on line 17 x Number of days on line 25 / 366 x 4% (0.04) | 26 | $ | $ | $ | $ |
| 27 Number of days on line 20 after 12/31/2016 and before 4/1/2017 | 27 | | | | |
| 28 Underpayment on line 17 x Number of days on line 27 / 365 x 4% (0.04) | 28 | $ | $ | $ | $ |
| 29 Number of days on line 20 after 3/31/2017 and before 7/1/2017 | 29 | | | | |
| 30 Underpayment on line 17 x Number of days on line 29 / 365 x *% | 30 | $ | $ | $ | $ |
| 31 Number of days on line 20 after 6/30/2017 and before 10/1/2017 | 31 | | | | |
| 32 Underpayment on line 17 x Number of days on line 31 / 365 x *% | 32 | $ | $ | $ | $ |
| 33 Number of days on line 20 after 9/30/2017 and before 1/1/2018 | 33 | | | | |
| 34 Underpayment on line 17 x Number of days on line 33 / 365 x *% | 34 | $ | $ | $ | $ |
| 35 Number of days on line 20 after 12/31/2017 and before 3/16/2018 | 35 | | | | |
| 36 Underpayment on line 17 x Number of days on line 35 / 365 x *% | 36 | $ | $ | $ | $ |
| 37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36 | 37 | $ | $ | $ | $ |

38 **Penalty.** Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 33; or the comparable line for other income tax returns ..... 38 $ 0.

* Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at *www.irs.gov.* You can also call 1-800-829-4933 to get interest rate information.

**Schedule A** **Adjusted Seasonal Installment Method and Annualized Income Installment Method**
See instructions.

**Form 1120S filers:** *For lines 1, 2, 3, and 21, below, "taxable income" refers to excess net passive income or the amount on which tax is imposed under section 1374(a), whichever applies.*

## Part I Adjusted Seasonal Installment Method

**Caution:** Use this method only if the base period percentage for any 6 consecutive months is at least 70%. See instructions.

| | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| **1** Enter taxable income for the following periods: | | First 3 months | First 5 months | First 8 months | First 11 months |
| **a** Tax year beginning in 2013 | 1a | | | | |
| **b** Tax year beginning in 2014 | 1b | | | | |
| **c** Tax year beginning in 2015 | 1c | | | | |
| **2** Enter taxable income for each period for the tax year beginning in 2016. See the instructions for the treatment of extraordinary items | 2 | | | | |
| **3** Enter taxable income for the following periods: | | First 4 months | First 6 months | First 9 months | Entire year |
| **a** Tax year beginning in 2013 | 3a | | | | |
| **b** Tax year beginning in 2014 | 3b | | | | |
| **c** Tax year beginning in 2015 | 3c | | | | |
| **4** Divide the amount in each column on line 1a by the amount in column (d) on line 3a | 4 | | | | |
| **5** Divide the amount in each column on line 1b by the amount in column (d) on line 3b | 5 | | | | |
| **6** Divide the amount in each column on line 1c by the amount in column (d) on line 3c | 6 | | | | |
| **7** Add lines 4 through 6 | 7 | | | | |
| **8** Divide line 7 by 3.0 | 8 | | | | |
| **9a** Divide line 2 by line 8 | 9a | | | | |
| **b** Extraordinary items (see instructions) | 9b | | | | |
| **c** Add lines 9a and 9b | 9c | | | | |
| **10** Figure the tax on the amt on ln 9c using the instr for Form 1120, Sch J, line 2 or comparable line of corp's return | 10 | | | | |
| **11a** Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a | 11a | | | | |
| **b** Divide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b | 11b | | | | |
| **c** Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c | 11c | | | | |
| **12** Add lines 11a though 11c | 12 | | | | |
| **13** Divide line 12 by 3.0 | 13 | | | | |
| **14** Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13. In column (d), enter the amount from line 10, column (d) | 14 | | | | |
| **15** Enter any alternative minimum tax for each payment period. See instructions | 15 | | | | |
| **16** Enter any other taxes for each payment period. See instr. | 16 | | | | |
| **17** Add lines 14 through 16 | 17 | | | | |
| **18** For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions | 18 | | | | |
| **19** Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0- | 19 | | | | |

## Part II Annualized Income Installment Method

| | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| 20 Annualization periods (see instructions) | 20 | First ___ months | First ___ months | First ___ months | First ___ months |
| 21 Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items | 21 | | | | |
| 22 Annualization amounts (see instructions) | 22 | | | | |
| 23a Annualized taxable income. Multiply line 21 by line 22 | 23a | | | | |
| b Extraordinary items (see instructions) | 23b | | | | |
| c Add lines 23a and 23b | 23c | | | | |
| 24 Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return | 24 | | | | |
| 25 Enter any alternative minimum tax for each payment period (see instructions) | 25 | | | | |
| 26 Enter any other taxes for each payment period. See instr. | 26 | | | | |
| 27 Total tax. Add lines 24 through 26 | 27 | | | | |
| 28 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions | 28 | | | | |
| 29 Total tax after credits. Subtract line 28 from line 27. If zero or less, enter -0- | 29 | | | | |
| 30 Applicable percentage | 30 | 25% | 50% | 75% | 100% |
| 31 Multiply line 29 by line 30 | 31 | | | | |

## Part III Required Installments

| **Note:** Complete lines 32 through 38 of one column before completing the next column. | | 1st installment | 2nd installment | 3rd installment | 4th installment |
|---|---|---|---|---|---|
| 32 If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the **smaller** of the amounts in each column from line 19 or line 31 | 32 | 0. | 0. | 0. | 0. |
| 33 Add the amounts in all preceding columns of line 38. See instructions | 33 | | | | |
| 34 **Adjusted seasonal or annualized income installments.** Subtract line 33 from line 32. If zero or less, enter -0- | 34 | | | | |
| 35 Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. **Note:** "Large corporations," see the instructions for line 10 for the amounts to enter | 35 | | | | |
| 36 Subtract line 38 of the preceding column from line 37 of the preceding column | 36 | | | | |
| 37 Add lines 35 and 36 | 37 | | | | |
| 38 **Required installments.** Enter the **smaller** of line 34 or line 37 here and on page 1 of Form 2220, line 10. See instructions | 38 | 0. | 0. | 0. | 0. |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST-MENT INCOME | (C) ADJUSTED NET INCOME |
|---|---|---|---|---|---|
| FROM PARTNERSHIPS | 8,188,142. | 0. | 8,188,142. | 10,141,253. | |
| TO PART I, LINE 4 | 8,188,142. | 0. | 8,188,142. | 10,141,253. | |

FORM 990-PF OTHER INCOME STATEMENT 2

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST-MENT INCOME | (C) ADJUSTED NET INCOME |
|---|---|---|---|
| PARTNERSHIP INCOME | 23,681. | -12,345,871. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 23,681. | -12,345,871. | |

FORM 990-PF LEGAL FEES STATEMENT 3

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST-MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|---|---|---|---|
| LEGAL | 44,712. | 22,356. | | 22,356. |
| TO FM 990-PF, PG 1, LN 16A | 44,712. | 22,356. | | 22,356. |

FORM 990-PF ACCOUNTING FEES STATEMENT 4

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST-MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|---|---|---|---|
| ACCOUNTING SERVICES | 113,597. | 72,526. | | 41,071. |
| TO FORM 990-PF, PG 1, LN 16B | 113,597. | 72,526. | | 41,071. |

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|---|---|---|---|
| INVESTMENT EXPENSE | 19,642. | 19,642. | | 0. |
| PROFESSIONAL SERVICES | 83,398. | 0. | | 83,398. |
| TO FORM 990-PF, PG 1, LN 16C | 103,040. | 19,642. | | 83,398. |

FORM 990-PF TAXES STATEMENT 6

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|---|---|---|---|
| FEDERAL EXCISE AND OTHER TAXES | 151,732. | 0. | | 0. |
| FOREIGN TAXES | 0. | 558,763. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 151,732. | 558,763. | | 0. |

FORM 990-PF OTHER EXPENSES STATEMENT 7

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|---|---|---|---|
| INSURANCE | 28,326. | 0. | | 28,326. |
| RECRUITING AND RELOCATION | 185,022. | 0. | | 185,022. |
| COMMUNICATIONS | 353,860. | 0. | | 353,860. |
| COMPUTER SERVICES | 319,536. | 0. | | 319,536. |
| OFFICE EXPENSE | 33,151. | 0. | | 33,151. |
| BANK CUSTODIAL FEES | 162. | 0. | | 162. |
| PARKING | 12,071. | 0. | | 12,071. |
| ACH FEES | 14,144. | 0. | | 14,144. |
| LOC ACCOMMODATION FEE | 635. | 0. | | 635. |
| TO FORM 990-PF, PG 1, LN 23 | 946,907. | 0. | | 946,907. |

| FORM 990-PF | CORPORATE STOCK | STATEMENT 8 |
|---|---|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|---|---|
| CORPORATE STOCKS | 22,691,551. | 22,691,551. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 22,691,551. | 22,691,551. |

| FORM 990-PF | OTHER INVESTMENTS | STATEMENT 9 |
|---|---|---|

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|---|---|---|---|
| MULTI-STRATEGY | FMV | 405,717,001. | 405,717,001. |
| NET RECEIVABLE ON UNSETTLED TRANSACTIONS | COST | 29,263,159. | 29,263,159. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 434,980,160. | 434,980,160. |

| FORM 990-PF | OTHER LIABILITIES | STATEMENT 10 |
|---|---|---|

| DESCRIPTION | BOY AMOUNT | EOY AMOUNT |
|---|---|---|
| DEFERRED FEDERAL EXCISE TAX | 748,384. | 358,102. |
| DEFERRED LEASE INCENTIVE | 388,535. | 312,102. |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 1,136,919. | 670,204. |

FORM 990-PF EXPENDITURE RESPONSIBILITY STATEMENT STATEMENT 11
PART VII-B, LINE 5C

GRANTEE'S NAME

ENACT LEADERSHIP (FORMERLY ENACT GLOBAL CONSULTING)

GRANTEE'S ADDRESS

2748 ADELINE STREET, SUITE B
BERKELEY, CA 94703

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 145,000. | 12/15/15 | 139,400. |

PURPOSE OF GRANT

FOR COACHING AND SUPPORT OF THE LEADERSHIP TEAMS DRIVING CHANGE IN THE SAN FRANCISCO SCHOOL DISTRICT AND ITS EARLY CHILDHOOD DIVISION. $145,000

DATES OF REPORTS BY GRANTEE

02/15/16, 10/31/16

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

ENACT LEADERSHIP (FORMERLY ENACT GLOBAL CONSULTING)

GRANTEE'S ADDRESS

2748 ADELINE STREET, SUITE B
BERKELEY, CA 94703

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 115,000. | 11/15/16 | 0. |

PURPOSE OF GRANT

FOR EXECUTIVE AND SENIOR TEAM DEVELOPMENT SUPPORT OF LEADERS WHO ARE DRIVING CHANGE IN THE SAN FRANCISCO UNIFIED SCHOOL DISTRICT. $115,000

DATES OF REPORTS BY GRANTEE

NONE IN 2016

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

GOODWIN SIMON STRATEGIC RESEARCH

GRANTEE'S ADDRESS

1730 FRANKLIN STREET, SUITE 211
OAKLAND, CA 94612

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 75,000. | 01/15/16 | 75,000. |

PURPOSE OF GRANT

TO SUPPORT RESEARCH AND DEVELOP MESSAGES ON THE IMPORTANCE OF NONDISCRIMINATION PROTECTIONS FOR LESBIAN, GAY, BISEXUAL AND TRANSGENDER PEOPLE. $75,000

DATES OF REPORTS BY GRANTEE

7/14/16

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

SPITFIRE STRATEGIES, LLC

GRANTEE'S ADDRESS

1800 M STREET NW, SUITE 300
WASHINGTON, DC 20036

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 25,000. | 12/15/15 | 21,577. |

PURPOSE OF GRANT

FOR THE ANDACTION PROJECT TO HELP SOCIAL JUSTICE ORGANIZATIONS TAKE ADVANTAGE OF STORIES ABOUT THEIR CAUSES IN TELEVISION PROGRAMS AND MOVIES. $25,000

DATES OF REPORTS BY GRANTEE

02/19/16, 12/8/16

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

SPITFIRE STRATEGIES, LLC

GRANTEE'S ADDRESS

1800 M STREET NW, SUITE 300
WASHINGTON, DC 20036

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 42,000. | 06/15/16 | 42,000. |

PURPOSE OF GRANT

TO SUPPORT EXECUTIVE-LEVEL STRATEGIC COMMUNICATIONS TRAINING AND COACHING.
$42,000

DATES OF REPORTS BY GRANTEE

01/17/17

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

EYEPOP PRODUCTIONS

GRANTEE'S ADDRESS

565 RUGBY ROAD
BROOKLYN, NY 11230

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
| --- | --- | --- |
| 50,000. | 10/30/16 | 50,000. |

PURPOSE OF GRANT

TO ENSURE THE BROAD DISTRIBUTION OF ITS "FREEDOM TO MARRY," DOCUMENTARY ON HOW THE GAY MOVEMENT MOVED THE NATION TO EMBRACE THE FREEDOM TO MARRY. $50,000

DATES OF REPORTS BY GRANTEE

03/21/17

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

SCOUTSEVEN

GRANTEE'S ADDRESS

6536 DANA STREET
OAKLAND, CA 94609

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 35,000. | 07/15/16 | 35,000. |

PURPOSE OF GRANT

TO ENHANCE THE "DISCOVER OUR MODEL" SECTION OF THE WEBSITE OF THE DREAMER PROGRAM AT THE UNIVERSITY OF CALIFORNIA, BERKELEY. $40,000

DATES OF REPORTS BY GRANTEE

02/24/17

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

SCOUTSEVEN

GRANTEE'S ADDRESS

6536 DANA STREET
OAKLAND, CA 94609

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 5,000. | 10/15/16 | 5,000. |

PURPOSE OF GRANT

TO ENHANCE THE "DISCOVER OUR MODEL" SECTION OF THE WEBSITE OF THE DREAMER PROGRAM AT THE UNIVERSITY OF CALIFORNIA, BERKELEY. $40,000

DATES OF REPORTS BY GRANTEE

02/24/17

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

GRANTEE'S NAME

SPITFIRE STRATEGIES, LLC

GRANTEE'S ADDRESS

1800 M STREET NW, STE 300
WASHINGTON, DC 20036

| GRANT AMOUNT | DATE OF GRANT | AMOUNT EXPENDED |
|---|---|---|
| 20,000. | 12/15/16 | 0. |

PURPOSE OF GRANT

TO SUPPORT EXECUTIVE-LEVEL STRATEGIC COMMUNICATIONS TRAINING AND COACHING.
$84,000

DATES OF REPORTS BY GRANTEE

10/05/17

ANY DIVERSION BY GRANTEE

NO FUNDS WERE DIVERTED FROM THE PURPOSE OF THE GRANT.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 12

ACTIVITY ONE

CONSULTATION TO LOCAL AND NATIONAL NONPROFIT LEADERS ON MAJOR INITIATIVES, MEETING AND ADVISING HIGH NET WORTH INDIVIDUALS TO ENCOURAGE AND EXPAND THEIR PHILANTHROPY, SERVICE OF FOUNDATION STAFF ON NONPROFIT BOARDS AND ADVISORY COUNCILS, TECHNICAL ASSISTANCE TO NONPROFIT ORGANIZATIONS ON A VARIETY OF ISSUES AND CONVENING MEETINGS OF NONPROFIT LEADERS AND GRANT MAKERS.

| | EXPENSES |
|---|---|
| TO FORM 990-PF, PART IX-A, LINE 1 | 864,432. |

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 13
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ATTN: CLAYTON C. JUAN, GRANTS ADMINISTRATOR AT THE ADDRESS ON PAGE 1.
114 SANSOME STREET,STE 600
SAN FRANCISCO, CA 94104

TELEPHONE NUMBER

(415) 856-1400

FORM AND CONTENT OF APPLICATIONS

THE FUND'S WEBSITE (WWW.HAASJR.ORG) SHOULD BE CONSULTED TO DETERMINE THE FUND'S MOST CURRENT INFORMATION ABOUT WHAT WE FUND AND HOW TO APPLY FOR A GRANT. IN 2016, PROPOSALS WERE ACCEPTED ON AN INVITATION-ONLY BASIS.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FUND'S WEBSITE (WWW.HAASJR.ORG) SHOULD BE CONSULTED TO DETERMINE THE MOST CURRENT INFORMATION ABOUT WHAT WE FUND. THE FOLLOWING DESCRIBES THE RESTRICTIONS AND LIMITATIONS ON AWARDS IN 2016. THE FUND SUPPORTS PRIMARILY ORGANIZATIONS THAT ARE TAX-EXEMPT UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS UNDER SECTION 509(A) OF THE CODE. THE FUND GENERALLY DOES NOT MAKE GRANTS FOR CAPITAL CAMPAIGNS, MAJOR EQUIPMENT, BASIC RESEARCH, CONFERENCES, PUBLICATIONS, FILMS OR VIDEOS, DEFICIT OR EMERGENCY FUNDING, SCHOLARSHIPS, DIRECT MAIL CAMPAIGNS, FUNDRAISING EVENTS OR ANNUAL APPEALS.

GENERAL EXPLANATION STATEMENT 14

FORM/LINE IDENTIFIER

TANGIBLE PROPERTY REGULATION ELECTIONS:

EXPLANATION:

SECTION 1.263(A)-1(F) DE MINIMIS SAFE HARBOR ELECTION

TAXPAYER IS MAKING THE DE MINIMIS SAFE HARBOR ELECTION UNDER TREAS. REG. 1.263(A)-1(F) FOR ALL ELIGIBLE AMOUNTS PAID OR INCURRED DURING THE TAXABLE YEAR.

SECTION 1.263(A)-3(N) CAPITALIZATION ELECTION

TAXPAYER HEREBY ELECTS TO CAPITALIZE REPAIR AND MAINTENANCE COSTS UNDER TREAS. REG. 1.263(A)-3(N). THE COSTS WERE INCURRED DURING THE TAXABLE YEAR IN THE ELECTING TAXPAYER'S TRADE OR BUSINESS AND THE ELECTING TAXPAYER TREATS SUCH COSTS AS CAPITAL EXPENDITURES ON ITS BOOKS AND RECORDS.

GENERAL EXPLANATION STATEMENT 15

FORM/LINE IDENTIFIER

PART VII-A, LINE 12

EXPLANATION:

TAXPAYER MAKES GRANTS TO THE SAN FRANCISCO FOUNDATION, A PUBLIC CHARITY, TO BE ADVISED BY THE FUND'S PRESIDENT. IN OTHER GRANTS TO THE SAME CHARITY, IT MATCHES GIFTS EMPLOYEES AND TRUSTEES HAVE MADE TO FUNDS THAT THEY ADVISE.

EXTENDED TO NOVEMBER 15, 2017

Form **990-T** Department of the Treasury Internal Revenue Service

# Exempt Organization Business Income Tax Return
**(and proxy tax under section 6033(e))**

For calendar year 2016 or other tax year beginning , and ending .

▶ Information about Form 990-T and its instructions is available at www.irs.gov/form990t.

▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

OMB No. 1545-0687 **2016** Open to Public Inspection for 501(c)(3) Organizations Only

A ☐ Check box if address changed

Name of organization ( ☐ Check box if name changed and see instructions.)
EVELYN AND WALTER HAAS, JR. FUND

D Employer identification number (Employees' trust, see instructions.) 94-6068932

B Exempt under section [X] 501(C)(3) ☐ 408(e) ☐ 220(e) ☐ 408A ☐ 530(a) ☐ 529(a)

Print or Type

Number, street, and room or suite no. If a P.O. box, see instructions.
114 SANSOME STREET, NO. 600

E Unrelated business activity codes (See instructions.)

City or town, state or province, country, and ZIP or foreign postal code
SAN FRANCISCO, CA 94104

900003

C Book value of all assets at end of year 459305570.

F Group exemption number (See instructions.) ▶

G Check organization type ▶ [X] 501(c) corporation ☐ 501(c) trust ☐ 401(a) trust ☐ Other trust

H Describe the organization's primary unrelated business activity. ▶ INVESTMENTS IN PARTNERSHIPS

I During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? ▶ ☐ Yes [X] No
If "Yes," enter the name and identifying number of the parent corporation. ▶

J The books are in care of ▶ THE ORGANIZATION Telephone number ▶ (415) 856-1400

## Part I Unrelated Trade or Business Income

| | | Line | (A) Income | (B) Expenses | (C) Net |
|---|---|---|---|---|---|
| 1a | Gross receipts or sales | | | | |
| b | Less returns and allowances c Balance ▶ | 1c | | | |
| 2 | Cost of goods sold (Schedule A, line 7) | 2 | | | |
| 3 | Gross profit. Subtract line 2 from line 1c | 3 | | | |
| 4a | Capital gain net income (attach Schedule D) | 4a | 432,118. | | 432,118. |
| b | Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797) | 4b | | | |
| c | Capital loss deduction for trusts | 4c | | | |
| 5 | Income (loss) from partnerships and S corporations (attach statement) | 5 | 108,757. | STMT 16 | 108,757. |
| 6 | Rent income (Schedule C) | 6 | | | |
| 7 | Unrelated debt-financed income (Schedule E) | 7 | | | |
| 8 | Interest, annuities, royalties, and rents from controlled organizations (Sch. F) | 8 | | | |
| 9 | Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G) | 9 | | | |
| 10 | Exploited exempt activity income (Schedule I) | 10 | | | |
| 11 | Advertising income (Schedule J) | 11 | | | |
| 12 | Other income (See instructions; attach schedule) | 12 | | | |
| 13 | **Total.** Combine lines 3 through 12 | 13 | 540,875. | | 540,875. |

## Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions.)
(Except for contributions, deductions must be directly connected with the unrelated business income.)

| | | Line | Amount |
|---|---|---|---|
| 14 | Compensation of officers, directors, and trustees (Schedule K) | 14 | |
| 15 | Salaries and wages | 15 | |
| 16 | Repairs and maintenance | 16 | |
| 17 | Bad debts | 17 | |
| 18 | Interest (attach schedule) | 18 | |
| 19 | Taxes and licenses | 19 | 12,060. |
| 20 | Charitable contributions (See instructions for limitation rules) STATEMENT 18 SEE STATEMENT 17 | 20 | 0. |
| 21 | Depreciation (attach Form 4562) 21 | | |
| 22 | Less depreciation claimed on Schedule A and elsewhere on return 22a | 22b | |
| 23 | Depletion | 23 | |
| 24 | Contributions to deferred compensation plans | 24 | |
| 25 | Employee benefit programs | 25 | |
| 26 | Excess exempt expenses (Schedule I) | 26 | |
| 27 | Excess readership costs (Schedule J) | 27 | |
| 28 | Other deductions (attach schedule) | 28 | |
| 29 | **Total deductions.** Add lines 14 through 28 | 29 | 12,060. |
| 30 | Unrelated business taxable income before net operating loss deduction. Subtract line 29 from line 13 | 30 | 528,815. |
| 31 | Net operating loss deduction (limited to the amount on line 30) SEE STATEMENT 19 | 31 | 528,815. |
| 32 | Unrelated business taxable income before specific deduction. Subtract line 31 from line 30 | 32 | 0. |
| 33 | Specific deduction (Generally $1,000, but see line 33 instructions for exceptions) | 33 | 1,000. |
| 34 | **Unrelated business taxable income.** Subtract line 33 from line 32. If line 33 is greater than line 32, enter the smaller of zero or line 32 | 34 | 0. |

# FOR PUBLIC DISCLOSURE

Form **8868**
(Rev. January 2017)
Department of the Treasury
Internal Revenue Service

## Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**
▶ **Information about Form 8868 and its instructions is at** *www.irs.gov/form8868*.

OMB No. 1545-1709

**Electronic filing** *(e-file).* You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile*, click on Charities & Non-Profits, and click on *e-file* for *Charities and Non-Profits.*

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Enter filer's identifying number**

**Type or print**

File by the due date for filing your return. See instructions.

Name of exempt organization or other filer, see instructions.
EVELYN AND WALTER HAAS, JR. FUND

Employer identification number (EIN) or
94-6068932

Number, street, and room or suite no. If a P.O. box, see instructions.
114 SANSOME STREET, NO. 600

Social security number (SSN)

City, town or post office, state, and ZIP code. For a foreign address, see instructions.
SAN FRANCISCO, CA 94104

Enter the Return Code for the return that this application is for (file a separate application for each return) ........ 0 7

| Application Is For | Return Code | Application Is For | Return Code |
|---|---|---|---|
| Form 990 or Form 990-EZ | 01 | Form 990-T (corporation) | 07 |
| Form 990-BL | 02 | Form 1041-A | 08 |
| Form 4720 (individual) | 03 | Form 4720 (other than individual) | 09 |
| Form 990-PF | 04 | Form 5227 | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | 12 |

- The books are in the care of ▶ MONICA PRESSLEY
114 SANSOME STREET, STE 600 - SAN FRANCISCO, CA 94104
Telephone No. ▶ (415) 856-1400 Fax No. ▶
- If the organization does not have an office or place of business in the United States, check this box ........ ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ ☐. If it is for part of the group, check this box ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until NOVEMBER 15, 2017, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☒ calendar year 2016 or
▶ ☐ tax year beginning ______, and ending ______.

**2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

| | | | |
|---|---|---|---|
| **3a** | If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. | **3a** | $ 0. |
| **b** | If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | **3b** | $ 89,444. |
| **c** | **Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | **3c** | $ 0. |

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

# FOR PUBLIC DISCLOSURE



## Part III Tax Computation

| | | | |
|---|---|---|---|
| 35 | **Organizations Taxable as Corporations.** See instructions for tax computation. Controlled group members (sections 1561 and 1563) check here ▶ ☐ **See instructions** and: | | |
| a | Enter your share of the $50,000, $25,000, and $9,925,000 taxable income brackets (in that order): (1) $ (2) $ (3) $ | | |
| b | Enter organization's share of: (1) Additional 5% tax (not more than $11,750) $ (2) Additional 3% tax (not more than $100,000) $ | | |
| c | Income tax on the amount on line 34 ▶ | 35c | 0. |
| 36 | **Trusts Taxable at Trust Rates.** See instructions for tax computation. Income tax on the amount on line 34 from: Tax rate schedule or Schedule D (Form 1041) ▶ | 36 | |
| 37 | **Proxy tax.** See instructions ▶ | 37 | |
| 38 | Alternative minimum tax | 38 | 10,644. |
| 39 | **Tax on Non-Compliant Facility Income.** See instructions | 39 | |
| 40 | **Total.** Add lines 37, 38 and 39 to line 35c or 36, whichever applies | 40 | 10,644. |

## Part IV Tax and Payments

| | | | | | |
|---|---|---|---|---|---|
| 41a | Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116) | 41a | | | |
| b | Other credits (see instructions) | 41b | | | |
| c | General business credit. Attach Form 3800 | 41c | | | |
| d | Credit for prior year minimum tax (attach Form 8801 or 8827) | 41d | | | |
| e | **Total credits.** Add lines 41a through 41d | | | 41e | |
| 42 | Subtract line 41e from line 40 | | | 42 | 10,644. |
| 43 | Other taxes. Check if from: Form 4255 ☐ Form 8611 ☐ Form 8697 ☐ Form 8866 ☐ Other (attach schedule) | | | 43 | |
| 44 | **Total tax.** Add lines 42 and 43 | | | 44 | 10,644. |
| 45 a | Payments: A 2015 overpayment credited to 2016 | 45a | 89,444. | | |
| b | 2016 estimated tax payments | 45b | | | |
| c | Tax deposited with Form 8868 | 45c | | | |
| d | Foreign organizations: Tax paid or withheld at source (see instructions) | 45d | | | |
| e | Backup withholding (see instructions) | 45e | | | |
| f | Credit for small employer health insurance premiums (Attach Form 8941) | 45f | | | |
| g | Other credits and payments: Form 2439 ____ Form 4136 ____ Other ____ Total ▶ | 45g | | | |
| 46 | **Total payments.** Add lines 45a through 45g | | | 46 | 89,444. |
| 47 | Estimated tax penalty (see instructions). Check if Form 2220 is attached ▶ | | | 47 | |
| 48 | **Tax due.** If line 46 is less than the total of lines 44 and 47, enter amount owed ▶ | | | 48 | |
| 49 | **Overpayment.** If line 46 is larger than the total of lines 44 and 47, enter amount overpaid ▶ | | | 49 | 78,800. |
| 50 | Enter the amount of line 49 you want: **Credited to 2017 estimated tax** ▶ 78,800. **Refunded** ▶ | | | 50 | 0. |

## Part V Statements Regarding Certain Activities and Other Information (see instructions)

| | | Yes | No |
|---|---|---|---|
| 51 | At any time during the 2016 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If YES, the organization may have to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If YES, enter the name of the foreign country here ▶ | | X |
| 52 | During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If YES, see instructions for other forms the organization may have to file. | | X |
| 53 | Enter the amount of tax-exempt interest received or accrued during the tax year ▶$ | | |

**Sign Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer ____ Date ____ CFO Title

May the IRS discuss this return with the preparer shown below (see instructions)? X Yes ☐ No

**Paid Preparer Use Only**

| Print/Type preparer's name | Preparer's signature | Date | Check ☐ if self- employed | PTIN |
|---|---|---|---|---|
| JOAN S. MCMAHON | Joan McMahon | 11/11/17 | | P00966494 |

Firm's name ▶ DELOITTE TAX LLP — Firm's EIN ▶ 86-1065772

Firm's address ▶ 555 MISSION STREET SAN FRANCISCO, CA 94105 — Phone no. (415) 783-4000

# FOR PUBLIC DISCLOSURE



## Schedule A - Cost of Goods Sold. Enter method of inventory valuation ▶ N/A

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 1 | Inventory at beginning of year | 1 | | 6 | Inventory at end of year | 6 | |
| 2 | Purchases | 2 | | 7 | **Cost of goods sold.** Subtract line 6 from line 5. Enter here and in Part I, line 2 | 7 | |
| 3 | Cost of labor | 3 | | | | | |
| 4 a | Additional section 263A costs (attach schedule) | 4a | | 8 | Do the rules of section 263A (with respect to property produced or acquired for resale) apply to the organization? | Yes | No |
| b | Other costs (attach schedule) | 4b | | | | | |
| 5 | **Total.** Add lines 1 through 4b | 5 | | | | | |

## Schedule C - Rent Income (From Real Property and Personal Property Leased With Real Property)
(see instructions)

1. Description of property

(1)
(2)
(3)
(4)

| | 2. Rent received or accrued | | |
|---|---|---|---|
| | (a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%) | (b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income) | 3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule) |
| (1) | | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| Total | 0. | Total 0. | |
| (c) **Total income.** Add totals of columns 2(a) and 2(b). Enter here and on page 1, Part I, line 6, column (A) ▶ | | 0. | (b) **Total deductions.** Enter here and on page 1, Part I, line 6, column (B) ▶ 0. |

## Schedule E - Unrelated Debt-Financed Income (see instructions)

| | 1. Description of debt-financed property | 2. Gross income from or allocable to debt-financed property | 3. Deductions directly connected with or allocable to debt-financed property (a) Straight line depreciation (attach schedule) | (b) Other deductions (attach schedule) |
|---|---|---|---|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |

| | 4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule) | 5. Average adjusted basis of or allocable to debt-financed property (attach schedule) | 6. Column 4 divided by column 5 | 7. Gross income reportable (column 2 x column 6) | 8. Allocable deductions (column 6 x total of columns 3(a) and 3(b)) |
|---|---|---|---|---|---|
| (1) | | | % | | |
| (2) | | | % | | |
| (3) | | | % | | |
| (4) | | | % | | |
| | | | | Enter here and on page 1, Part I, line 7, column (A). | Enter here and on page 1, Part I, line 7, column (B). |
| **Totals** ▶ | | | | 0. | 0. |
| **Total dividends-received deductions** included in column 8 ▶ | | | | | 0. |

Form **990-T** (2016)

# FOR PUBLIC DISCLOSURE



## Schedule F - Interest, Annuities, Royalties, and Rents From Controlled Organizations (see instructions)

Exempt Controlled Organizations

| 1. Name of controlled organization | 2. Employer identification number | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | 6. Deductions directly connected with income in column 5 |
|---|---|---|---|---|---|
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |

Nonexempt Controlled Organizations

| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 |
|---|---|---|---|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| Totals ▶ | | | Add columns 5 and 10. Enter here and on page 1, Part I, line 8, column (A). 0. | Add columns 6 and 11. Enter here and on page 1, Part I, line 8, column (B). 0. |

## Schedule G - Investment Income of a Section 501(c)(7), (9), or (17) Organization

(see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach schedule) | 4. Set-asides (attach schedule) | 5. Total deductions and set-asides (col. 3 plus col. 4) |
|---|---|---|---|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| Totals ▶ | Enter here and on page 1, Part I, line 9, column (A). 0. | | | Enter here and on page 1, Part I, line 9, column (B). 0. |

## Schedule I - Exploited Exempt Activity Income, Other Than Advertising Income

(see instructions)

| 1. Description of exploited activity | 2. Gross unrelated business income from trade or business | 3. Expenses directly connected with production of unrelated business income | 4. Net income (loss) from unrelated trade or business (column 2 minus column 3). If a gain, compute cols. 5 through 7. | 5. Gross income from activity that is not unrelated business income | 6. Expenses attributable to column 5 | 7. Excess exempt expenses (column 6 minus column 5, but not more than column 4). |
|---|---|---|---|---|---|---|
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Totals ▶ | Enter here and on page 1, Part I, line 10, col. (A). 0. | Enter here and on page 1, Part I, line 10, col. (B). 0. | | | | Enter here and on page 1, Part II, line 26. 0. |

## Schedule J - Advertising Income (see instructions)

### Part I Income From Periodicals Reported on a Consolidated Basis

| 1. Name of periodical | 2. Gross advertising income | 3. Direct advertising costs | 4. Advertising gain or (loss) (col. 2 minus col. 3). If a gain, compute cols. 5 through 7. | 5. Circulation income | 6. Readership costs | 7. Excess readership costs (column 6 minus column 5, but not more than column 4). |
|---|---|---|---|---|---|---|
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Totals (carry to Part II, line (5)) ▶ | 0. | 0. | | | | 0. |

# FOR PUBLIC DISCLOSURE



**Part II Income From Periodicals Reported on a Separate Basis** (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis.)

| 1. Name of periodical | 2. Gross advertising income | 3. Direct advertising costs | 4. Advertising gain or (loss) (col. 2 minus col. 3). If a gain, compute cols. 5 through 7. | 5. Circulation income | 6. Readership costs | 7. Excess readership costs (column 6 minus column 5, but not more than column 4). |
|---|---|---|---|---|---|---|
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Totals from Part I ▶ | 0. | 0. | | | | 0. |
| | Enter here and on page 1, Part I, line 11, col. (A). | Enter here and on page 1, Part I, line 11, col. (B). | | | | Enter here and on page 1, Part II, line 27. |
| **Totals,** Part II (lines 1-5) ▶ | 0. | 0. | | | | 0. |

**Schedule K - Compensation of Officers, Directors, and Trustees** (see instructions)

| 1. Name | 2. Title | 3. Percent of time devoted to business | 4. Compensation attributable to unrelated business |
|---|---|---|---|
| (1) | | % | |
| (2) | | % | |
| (3) | | % | |
| (4) | | % | |
| **Total.** Enter here and on page 1, Part II, line 14 ▶ | | | 0. |

Form **990-T** (2016)

# FOR PUBLIC DISCLOSURE

Form **4626** Department of the Treasury Internal Revenue Service

## Alternative Minimum Tax - Corporations

▶ Attach to the corporation's tax return.

▶ Information about Form 4626 and its separate instructions is at www.irs.gov/form4626.

OMB No. 1545-0123

**2016**

Name: EVELYN AND WALTER HAAS, JR. FUND

Employer identification number: 94-6068932

**Note:** See the instructions to find out if the corporation is a small corporation exempt from the alternative minimum tax (AMT) under section 55(e).

| | | | | | |
|---|---|---|---|---|---|
| 1 | Taxable income or (loss) before net operating loss deduction | | | 1 | 527,815. |
| 2 | **Adjustments and preferences:** | | | | |
| a | Depreciation of post-1986 property | | | 2a | 203. |
| b | Amortization of certified pollution control facilities | | | 2b | |
| c | Amortization of mining exploration and development costs | | | 2c | |
| d | Amortization of circulation expenditures (personal holding companies only) | | | 2d | |
| e | Adjusted gain or loss | | | 2e | -5. |
| f | Long-term contracts | | | 2f | |
| g | Merchant marine capital construction funds | | | 2g | |
| h | Section 833(b) deduction (Blue Cross, Blue Shield, and similar type organizations only) | | | 2h | |
| i | Tax shelter farm activities (personal service corporations only) | | | 2i | |
| j | Passive activities (closely held corporations and personal service corporations only) | | | 2j | |
| k | Loss limitations | | | 2k | |
| l | Depletion | | | 2l | |
| m | Tax-exempt interest income from specified private activity bonds | | | 2m | |
| n | Intangible drilling costs | | | 2n | 17,127. |
| o | Other adjustments and preferences STATEMENT 22 * | | | 2o | -10,358. |
| 3 | Pre-adjustment alternative minimum taxable income (AMTI). Combine lines 1 through 2o | | | 3 | 534,782. |
| 4 | **Adjusted current earnings (ACE) adjustment:** | | | | |
| a | ACE from line 10 of the ACE worksheet in the instructions | 4a | 534,782. | | |
| b | Subtract line 3 from line 4a. If line 3 exceeds line 4a, enter the difference as a negative amount. See instructions | 4b | 0. | | |
| c | Multiply line 4b by 75% (0.75). Enter the result as a positive amount | 4c | | | |
| d | Enter the excess, if any, of the corporation's total increases in AMTI from prior year ACE adjustments over its total reductions in AMTI from prior year ACE adjustments. See instructions. **Note:** You **must** enter an amount on line 4d (even if line 4b is positive) | 4d | | | |
| e | ACE adjustment.<br>• If line 4b is zero or more, enter the amount from line 4c<br>• If line 4b is less than zero, enter the **smaller** of line 4c or line 4d as a negative amount | | | 4e | 0. |
| 5 | Combine lines 3 and 4e. If zero or less, stop here; the corporation does not owe any AMT | | | 5 | 534,782. |
| 6 | Alternative tax net operating loss deduction. See instructions STATEMENT 23 | | | 6 | 441,563. |
| 7 | **Alternative minimum taxable income.** Subtract line 6 from line 5. If the corporation held a residual interest in a REMIC, see instructions | | | 7 | 93,219. |
| 8 | **Exemption phase-out** (if line 7 is $310,000 or more, skip lines 8a and 8b and enter -0- on line 8c): | | | | |
| a | Subtract $150,000 from line 7 (if completing this line for a member of a controlled group, see instructions). If zero or less, enter -0- | 8a | 0. | | |
| b | Multiply line 8a by 25% (0.25) | 8b | 0. | | |
| c | Exemption. Subtract line 8b from $40,000 (if completing this line for a member of a controlled group, see instructions). If zero or less, enter -0- | | | 8c | 40,000. |
| 9 | Subtract line 8c from line 7. If zero or less, enter -0- | | | 9 | 53,219. |
| 10 | Multiply line 9 by 20% (0.20) | | | 10 | 10,644. |
| 11 | Alternative minimum tax foreign tax credit (AMTFTC). See instructions | | | 11 | |
| 12 | Tentative minimum tax. Subtract line 11 from line 10 | | | 12 | 10,644. |
| 13 | Regular tax liability before applying all credits except the foreign tax credit | | | 13 | |
| 14 | **Alternative minimum tax.** Subtract line 13 from line 12. If zero or less, enter -0-. Enter here and on Form 1120, Schedule J, line 3, or the appropriate line of the corporation's income tax return | | | 14 | 10,644. |

JWA **For Paperwork Reduction Act Notice, see separate instructions.** Form **4626** (2016)

* SEE ALSO STATEMENT 20
STATEMENT 21

617001
12-06-16

## Adjusted Current Earnings (ACE) Worksheet

▶ See ACE Worksheet Instructions.

| | | | | |
|---|---|---|---|---|
| **1** | Pre-adjustment AMTI. Enter the amount from line 3 of Form 4626 | | **1** | 534,782. |
| **2** | ACE depreciation adjustment: | | | |
| **a** | AMT depreciation | **2a** | | |
| **b** | ACE depreciation: | | | |
| | (1) Post-1993 property | **2b(1)** | | |
| | (2) Post-1989, pre-1994 property | **2b(2)** | | |
| | (3) Pre-1990 MACRS property | **2b(3)** | | |
| | (4) Pre-1990 original ACRS property | **2b(4)** | | |
| | (5) Property described in sections 168(f)(1) through (4) | **2b(5)** | | |
| | (6) Other property | **2b(6)** | | |
| | (7) Total ACE depreciation. Add lines 2b(1) through 2b(6) | **2b(7)** | | |
| **c** | ACE depreciation adjustment. Subtract line 2b(7) from line 2a | | **2c** | |
| **3** | Inclusion in ACE of items included in earnings and profits (E&P): | | | |
| **a** | Tax-exempt interest income | **3a** | | |
| **b** | Death benefits from life insurance contracts | **3b** | | |
| **c** | All other distributions from life insurance contracts (including surrenders) | **3c** | | |
| **d** | Inside buildup of undistributed income in life insurance contracts | **3d** | | |
| **e** | Other items (see Regulations sections 1.56(g)-1(c)(6)(iii) through (ix) for a partial list) | **3e** | | |
| **f** | Total increase to ACE from inclusion in ACE of items included in E&P. Add lines 3a through 3e | | **3f** | |
| **4** | Disallowance of items not deductible from E&P: | | | |
| **a** | Certain dividends received | **4a** | | |
| **b** | Dividends paid on certain preferred stock of public utilities that are deductible under section 247 (as affected by P.L. 113-295, Div. A, section 221(a)(41)(A), Dec. 19, 2014, 128 Stat. 4043) | **4b** | | |
| **c** | Dividends paid to an ESOP that are deductible under section 404(k) | **4c** | | |
| **d** | Nonpatronage dividends that are paid and deductible under section 1382(c) | **4d** | | |
| **e** | Other items (see Regulations sections 1.56(g)-1(d)(3)(i) and (ii) for a partial list) | **4e** | | |
| **f** | Total increase to ACE because of disallowance of items not deductible from E&P. Add lines 4a through 4e | | **4f** | |
| **5** | Other adjustments based on rules for figuring E&P: | | | |
| **a** | Intangible drilling costs | **5a** | | |
| **b** | Circulation expenditures | **5b** | | |
| **c** | Organizational expenditures | **5c** | | |
| **d** | LIFO inventory adjustments | **5d** | | |
| **e** | Installment sales | **5e** | | |
| **f** | Total other E&P adjustments. Combine lines 5a through 5e | | **5f** | |
| **6** | Disallowance of loss on exchange of debt pools | | **6** | |
| **7** | Acquisition expenses of life insurance companies for qualified foreign contracts | | **7** | |
| **8** | Depletion | | **8** | |
| **9** | Basis adjustments in determining gain or loss from sale or exchange of pre-1994 property | | **9** | |
| **10** | **Adjusted current earnings.** Combine lines 1, 2c, 3f, 4f, and 5f through 9. Enter the result here and on line 4a of Form 4626 | | **10** | 534,782. |

FORM 990-T INCOME (LOSS) FROM PARTNERSHIPS AND S CORPORATIONS STATEMENT 16

| DESCRIPTION | AMOUNT |
| --- | --- |
| NET INCOME FROM RENTAL REAL ESTATE | -433. |
| ORDINARY INCOME FROM TRADE OR BUSINESS | 108,205. |
| INTEREST INCOME | 593. |
| DIVIDEND INCOME | 151. |
| ROYALTIES | 241. |
| TOTAL TO FORM 990-T, PAGE 1, LINE 5 | 108,757. |

FORM 990-T CONTRIBUTIONS STATEMENT 17

| DESCRIPTION/KIND OF PROPERTY | METHOD USED TO DETERMINE FMV | AMOUNT |
| --- | --- | --- |
| CONTRIBUTIONS | N/A | 23,371,500. |
| TOTAL TO FORM 990-T, PAGE 1, LINE 20 | | 23,371,500. |

FORM 990-T CONTRIBUTIONS SUMMARY STATEMENT 18

| | | |
|---|---|---|
| QUALIFIED CONTRIBUTIONS SUBJECT TO 100% LIMIT | | |
| CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS | | |
| FOR TAX YEAR 2011 | | |
| FOR TAX YEAR 2012 | | |
| FOR TAX YEAR 2013 | | |
| FOR TAX YEAR 2014 | | |
| FOR TAX YEAR 2015 | | |
| TOTAL CARRYOVER | | |
| TOTAL CURRENT YEAR 10% CONTRIBUTIONS | 23,371,500 | |
| TOTAL CONTRIBUTIONS AVAILABLE | 23,371,500 | |
| TAXABLE INCOME LIMITATION AS ADJUSTED | 0 | |
| EXCESS 10% CONTRIBUTIONS | 23,371,500 | |
| EXCESS 100% CONTRIBUTIONS | 0 | |
| TOTAL EXCESS CONTRIBUTIONS | 23,371,500 | |
| ALLOWABLE CONTRIBUTIONS DEDUCTION | | 0 |
| TOTAL CONTRIBUTION DEDUCTION | | 0 |

FORM 990-T NET OPERATING LOSS DEDUCTION STATEMENT 19

| TAX YEAR | LOSS SUSTAINED | LOSS PREVIOUSLY APPLIED | LOSS REMAINING | AVAILABLE THIS YEAR |
|---|---|---|---|---|
| 12/31/14 | 845,905. | 0. | 845,905. | 845,905. |
| 12/31/15 | 1,283,339. | 0. | 1,283,339. | 1,283,339. |
| NOL CARRYOVER AVAILABLE THIS YEAR | | | 2,129,244. | 2,129,244. |

FORM 4626 AMT CONTRIBUTION LIMITATION STATEMENT 20

| | |
|---|---|
| 1) REGULAR TAXABLE INCOME BEFORE NOL, CHARITABLE CONTRIBUTIONS, AND DOMESTIC PRODUCTION ACTIVITIES DEDUCTION (DPAD) . . . . | 527,815 |
| 2) ADD: OTHER AMT ADJUSTMENT AND PREFERENCE ITEMS OTHER THAN ACE, CHARITABLE CONTRIBUTIONS AND DPAD . . . . | 17,325 |
| 3) PREADJUSTMENT AMTI BEFORE ACE, CHARITABLE DEDUCTIONS, NOL AND DPAD . . . . . . . . . . . . . . . . . . . . . . | 545,140 |
| 4) ACE ADJUSTMENT ITEMS . . . . . . . . . . . . . . . . . . . . | |
| 5) ACE WITHOUT CHARITABLE CONTRIBUTIONS (LINE 3 PLUS LINE 4). . | 545,140 |
| 6) LINE 5 LESS LINE 3 (ENTER EXCESS AS A NEGATIVE AMOUNT) . . . | |
| 7) MULTIPLY LINE 6 BY 75%. ENTER RESULT AS A POSITIVE AMOUNT . | |
| 8) ENTER EXCESS OF THE CORPORATION'S PRIOR YEAR NET INCREASES IN AMTI DUE TO ACE . . . . . . . . . . . . . . . . . . . . | |
| 9) ACE ADJUSTMENT: IF LINE 6 IS POSITIVE OR ZERO ENTER THE AMOUNT FROM LINE 7 HERE AS A POSITIVE AMOUNT IF LINE 6 IS NEGATIVE, ENTER THE SMALLER OF LINE 7 OR LINE 8 HERE AS A NEGATIVE AMOUNT . . . . . . . . . . . | |
| 10) AMTI WITHOUT CHARITABLE CONTRIBUTIONS, NOL AND DPAD (LINE 3 PLUS LINE 9) . . . . . . . . . . . . . . . . . . . | 545,140 |
| 11) CONTRIBUTION LIMITATION TO CALCULATE 90% AMTI LIMITATION FOR NOL . . . . . . . .(LINE 10 PLUS SPECIAL DEDUCTIONS NOT PREVIOUSLY INCLUDED IN THE ACE ADJUSTMENT ON LINE 9 ABOVE, MULTIPLIED BY 10%). . . . . . . . . . . . . . . . . | 54,514 |
| 12) TOTAL AVAILABLE CONTRIBUTIONS . . . . . . . . . . . . . . . . . | 23,371,500 |
| 13) CONTRIBUTION DEDUCTION TO CALCULATE 90% AMTI LIMITATION FOR NOL (LESSER OF LINE 11 OR LINE 12) . . . . . . . . . . | 54,514 |
| 14) AMTI FOR PURPOSES OF 90% NOL LIMITATION (LINE 10 LESS LINE 13) . . . . . . . . . . . . . . . . . . . . . . . . | 490,626 |
| 15) NOL LIMITATION ( 90% OF LINE 14). . . . . . . . . . . . . . . . | 441,563 |
| 16) TOTAL NOL AVAILABLE . . . . . . . . . . . . . . . . . . . . . | 1,672,272 |
| 17) AMT NOL (LESSER OF LINE 15 OR LINE 16) . . . . . . . . . . | 441,563 |
| 18) AMTI FOR CHARITABLE DEDUCTION LIMITATION (LINE 10 PLUS SPECIAL DEDUCTIONS LESS AMT NOL ON LINE 17 ) . . . . . | 103,577 |
| 19) 10% OF LINE 18 . . . . . . . . . . . . . . . . . . . . . . | 10,358 |
| 20) AMT CHARITABLE DEDUCTION (LESSER OF LINE 12 OR LINE 19) . . | 10,358 |
| 21) REGULAR CONTRIBUTION DEDUCTION . . . . . . . . . . . . . . | 0 |
| 22) AMT CONTRIBUTION ADJUSTMENT (LINE 21 LESS LINE 20) . . . . | -10,358 |

| FORM 4626 | AMT CONTRIBUTIONS | STATEMENT 21 |
|---|---|---|

| | | |
|---|---|---|
| CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS | | |
| FOR TAX YEAR 2011 | | |
| FOR TAX YEAR 2012 | | |
| FOR TAX YEAR 2013 | | |
| FOR TAX YEAR 2014 | | |
| FOR TAX YEAR 2015 | | |
| TOTAL CARRYOVER | | |
| CURRENT YEAR CONTRIBUTIONS | | 23,371,500 |
| TOTAL CONTRIBUTIONS | | 23,371,500 |
| 10% OF TAXABLE INCOME AS ADJUSTED | | 10,358 |
| EXCESS CONTRIBUTIONS | | 23,361,142 |
| ALLOWABLE CONTRIBUTIONS | | 10,358 |

| FORM 4626 | OTHER AMT ADJUSTMENTS | STATEMENT 22 |
|---|---|---|

| DESCRIPTION | AMOUNT |
|---|---|
| CHARITABLE CONTRIBUTIONS | -10,358. |
| TOTAL TO FORM 4626, LINE 20 | -10,358. |

| FORM 4626 | ALTERNATIVE MINIMUM TAX NOL DEDUCTION | STATEMENT 23 |
|---|---|---|

| TAX YEAR | LOSS SUSTAINED | LOSS PREVIOUSLY APPLIED | LOSS REMAINING |
|---|---|---|---|
| 12/31/14 | 604,674. | 0. | 604,674. |
| 12/31/15 | 1,067,598. | 0. | 1,067,598. |
| AMT NOL CARRYOVER AVAILABLE THIS YEAR | | | 1,672,272. |

# FOR PUBLIC DISCLOSURE

**SCHEDULE D (Form 1120)**
Department of the Treasury
Internal Revenue Service

## Capital Gains and Losses

▶ Attach to Form 1120, 1120-C, 1120-F, 1120-FSC, 1120-H, 1120-IC-DISC, 1120-L, 1120-ND, 1120-PC, 1120-POL, 1120-REIT, 1120-RIC, 1120-SF, or certain Forms 990-T.
▶ Information about Schedule D (Form 1120) and its separate instructions is at www.irs.gov/form1120.

OMB No. 1545-0123
**2016**

| Name | Employer identification number |
|---|---|
| EVELYN AND WALTER HAAS, JR. FUND | 94-6068932 |

**Part I** Short-Term Capital Gains and Losses - Assets Held One Year or Less

| See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars. | (d) Proceeds (sales price) | (e) Cost (or other basis) | (g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g) | (h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g) |
|---|---|---|---|---|
| 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1b Totals for all transactions reported on Form(s) 8949 with **Box A** checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with **Box B** checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with **Box C** checked | | | | |

| | | |
|---|---|---|
| 4 Short-term capital gain from installment sales from Form 6252, line 26 or 37 | 4 | |
| 5 Short-term capital gain or (loss) from like-kind exchanges from Form 8824 | 5 | |
| 6 Unused capital loss carryover (attach computation) | 6 | ( ) |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column h | 7 | |

**Part II** Long-Term Capital Gains and Losses - Assets Held More Than One Year

| See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars. | (d) Proceeds (sales price) | (e) Cost (or other basis) | (g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g) | (h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g) |
|---|---|---|---|---|
| 8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8b Totals for all transactions reported on Form(s) 8949 with **Box D** checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with **Box F** checked | | | | 431,865. |

| | | |
|---|---|---|
| 11 Enter gain from Form 4797, line 7 or 9 | 11 | 253. |
| 12 Long-term capital gain from installment sales from Form 6252, line 26 or 37 | 12 | |
| 13 Long-term capital gain or (loss) from like-kind exchanges from Form 8824 | 13 | |
| 14 Capital gain distributions | 14 | |
| 15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column h | 15 | 432,118. |

**Part III** Summary of Parts I and II

| | | |
|---|---|---|
| 16 Enter excess of net short-term capital gain (line 7) over net long-term capital loss (line 15) | 16 | |
| 17 Net capital gain. Enter excess of net long-term capital gain (line 15) over net short-term capital loss (line 7) | 17 | 432,118. |
| 18 Add lines 16 and 17. Enter here and on Form 1120, page 1, line 8, or the proper line on other returns. If the corporation has qualified timber gain, also complete Part IV | 18 | 432,118. |

**Note:** If losses exceed gains, see **Capital losses** in the instructions.

## Part IV Alternative Tax for Corporations with Qualified Timber Gain.

Complete Part IV **only** if the corporation has qualified timber gain under section 1201(b). Skip this part if you are filing Form 1120-RIC. See instructions.

| | | | | |
|---|---|---|---|---|
| 19 | Enter qualified timber gain (as defined in section 1201(b)(2)) | 19 | | |
| 20 | Enter taxable income from Form 1120, page 1, line 30, or the applicable line of your tax return | 20 | | |
| 21 | Enter the smallest of: (a) the amount on line 19; (b) the amount on line 20; or (c) the amount on Part III, line 17 | 21 | | |
| 22 | Multiply line 21 by 23.8% (0.238) | | | 22 |
| 23 | Subtract line 17 from line 20. If zero or less, enter -0- | 23 | | |
| 24 | Enter the tax on line 23, figured using the Tax Rate Schedule (or applicable tax rate) appropriate for the return with which Schedule D (Form 1120) is being filed | | | 24 |
| 25 | Add lines 21 and 23 | 25 | | |
| 26 | Subtract line 25 from line 20. If zero or less, enter -0- | 26 | | |
| 27 | Multiply line 26 by 35% (0.35) | | | 27 |
| 28 | Add lines 22, 24, and 27 | | | 28 |
| 29 | Enter the tax on line 20, figured using the Tax Rate Schedule (or applicable tax rate) appropriate for the return with which Schedule D (Form 1120) is being filed | | | 29 |
| 30 | Enter the smaller of line 28 or line 29. Also enter this amount on Form 1120, Schedule J, line 2, or the applicable line of your tax return | | | 30 |

# FOR PUBLIC DISCLOSURE



Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side: EVELYN AND WALTER HAAS, JR. FUND

**Social security number or taxpayer identification no.** 94-6068932

*Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.*

**Part II** **Long-Term.** Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

**Note:** You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

**You must check Box D, E, or F below. Check only one box.** If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- [ ] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- [ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
- [X] **(F)** Long-term transactions not reported to you on Form 1099-B

| 1 (a) Description of property (Example: 100 sh. XYZ Co.) | (b) Date acquired (Mo., day, yr.) | (c) Date sold or disposed of (Mo., day, yr.) | (d) Proceeds (sales price) | (e) Cost or other basis. See the **Note** below and see *Column (e)* in the instructions | Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions. (f) Code(s) | (g) Amount of adjustment | (h) Gain or (loss). Subtract column (e) from column (d) & combine the result with column (g) |
|---|---|---|---|---|---|---|---|
| FROM PARTNERSHIPS | | | | | | | 431,865. |
| **2 Totals.** Add the amounts in columns (d), (e), (g) and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶ | | | | | | | 431,865. |

**Note:** If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

# FOR PUBLIC DISCLOSURE

Form **4797**

Department of the Treasury
Internal Revenue Service

**Sales of Business Property**

**(Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2))**

**▶ Attach to your tax return.**

**▶ Information about Form 4797 and its separate instructions is at** *www.irs.gov/form4797.*

OMB No. 1545-0184

**2016**

Attachment Sequence No. **27**

Name(s) shown on return: EVELYN AND WALTER HAAS, JR. FUND

Identifying number: 94-6068932

**1** Enter the gross proceeds from sales or exchanges reported to you for 2016 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20 .......... **1**

**Part I** **Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft-Most Property Held More Than 1 Year** (see instructions)

| 2 (a) Description of property | (b) Date acquired (mo., day, yr.) | (c) Date sold (mo., day, yr.) | (d) Gross sales price | (e) Depreciation allowed or allowable since acquisition | (f) Cost or other basis, plus improvements and expense of sale | (g) Gain or (loss) Subtract (f) from the sum of (d) and (e) |
|---|---|---|---|---|---|---|
| FROM PARTNERSHIPS | VARIOUS | VARIOUS | | | | 253. |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | | |
|---|---|---|---|
| 3 | Gain, if any, from Form 4684, line 39 | 3 | |
| 4 | Section 1231 gain from installment sales from Form 6252, line 26 or 37 | 4 | |
| 5 | Section 1231 gain or (loss) from like-kind exchanges from Form 8824 | 5 | |
| 6 | Gain, if any, from line 32, from other than casualty or theft | 6 | |
| 7 | Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows: | 7 | 253. |

**Partnerships (except electing large partnerships) and S corporations.** Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.

**Individuals, partners, S corporation shareholders, and all others.** If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you didn't have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.

| | | | |
|---|---|---|---|
| 8 | Nonrecaptured net section 1231 losses from prior years. See instructions | 8 | |
| 9 | Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return. See instructions | 9 | 253. |

**Part II** **Ordinary Gains and Losses** (see instructions)

**10** Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | | |
|---|---|---|---|
| 11 | Loss, if any, from line 7 | 11 | ( ) |
| 12 | Gain, if any, from line 7 or amount from line 8, if applicable | 12 | |
| 13 | Gain, if any, from line 31 | 13 | |
| 14 | Net gain or (loss) from Form 4684, lines 31 and 38a | 14 | |
| 15 | Ordinary gain from installment sales from Form 6252, line 25 or 36 | 15 | |
| 16 | Ordinary gain or (loss) from like-kind exchanges from Form 8824 | 16 | |
| 17 | Combine lines 10 through 16 | 17 | |
| 18 | For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below: | | |
| a | If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the part of the loss from income-producing property on Schedule A (Form 1040), line 28, and the part of the loss from property used as an employee on Schedule A (Form 1040), line 23. Identify as from "Form 4797, line 18a." See instructions | 18a | |
| b | Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Form 1040, line 14 | 18b | |

LHA **For Paperwork Reduction Act Notice, see separate instructions.** Form **4797** (2016)

618011 12-20-16

**Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255** (see instructions)

| 19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property: | (b) Date acquired (mo., day, yr.) | (c) Date sold (mo., day, yr.) |
|---|---|---|
| A | | |
| B | | |
| C | | |
| D | | |

| These columns relate to the properties on lines 19A through 19D. ▶ | | Property A | Property B | Property C | Property D |
|---|---|---|---|---|---|
| 20 Gross sales price (**Note:** See line 1 before completing.) | 20 | | | | |
| 21 Cost or other basis plus expense of sale | 21 | | | | |
| 22 Depreciation (or depletion) allowed or allowable | 22 | | | | |
| 23 Adjusted basis. Subtract line 22 from line 21 | 23 | | | | |
| 24 Total gain. Subtract line 23 from line 20 | 24 | | | | |
| 25 **If section 1245 property:** | | | | | |
| a Depreciation allowed or allowable from line 22 | 25a | | | | |
| b Enter the **smaller** of line 24 or 25a | 25b | | | | |
| 26 **If section 1250 property:** If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291. | | | | | |
| a Additional depreciation after 1975. See instructions | 26a | | | | |
| b Applicable percentage multiplied by the **smaller** of line 24 or line 26a. See instructions | 26b | | | | |
| c Subtract line 26a from line 24. If residential rental property **or** line 24 isn't more than line 26a, skip lines 26d and 26e | 26c | | | | |
| d Additional depreciation after 1969 and before 1976 | 26d | | | | |
| e Enter the **smaller** of line 26c or 26d | 26e | | | | |
| f Section 291 amount (corporations only) | 26f | | | | |
| g Add lines 26b, 26e, and 26f | 26g | | | | |
| 27 **If section 1252 property:** Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership (other than an electing large partnership). | | | | | |
| a Soil, water, and land clearing expenses | 27a | | | | |
| b Line 27a multiplied by applicable percentage | 27b | | | | |
| c Enter the **smaller** of line 24 or 27b | 27c | | | | |
| 28 **If section 1254 property:** | | | | | |
| a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions | 28a | | | | |
| b Enter the **smaller** of line 24 or 28a | 28b | | | | |
| 29 **If section 1255 property:** | | | | | |
| a Applicable percentage of payments excluded from income under section 126. See instructions | 29a | | | | |
| b Enter the **smaller** of line 24 or 29a. See instructions | 29b | | | | |

**Summary of Part III Gains.** Complete property columns A through D through line 29b before going to line 30.

| | | |
|---|---|---|
| 30 Total gains for all properties. Add property columns A through D, line 24 | 30 | |
| 31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13 | 31 | |
| 32 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6 | 32 | |

**Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less** (see instructions)

| | | (a) Section 179 | (b) Section 280F(b)(2) |
|---|---|---|---|
| 33 Section 179 expense deduction or depreciation allowable in prior years | 33 | | |
| 34 Recomputed depreciation. See instructions | 34 | | |
| 35 Recapture amount. Subtract line 34 from line 33. See the instructions for where to report | 35 | | |

FOR PUBLIC DISCLOSURE

Form **8903** (Rev. December 2010) Department of the Treasury Internal Revenue Service

# Domestic Production Activities Deduction

▶ Attach to your tax return. ▶ See separate instructions.

OMB No. 1545-1984

Attachment Sequence No. 143

Name(s) as shown on return: EVELYN AND WALTER HAAS, JR. FUND

Identifying number: 94-6068932

**Note. Do not** complete column (a), unless you have oil-related production activities. Enter amounts for all activities in column (b), including oil-related production activities.

| | | | (a) Oil-related production activities | (b) All activities |
|---|---|---|---|---|
| 1 | Domestic production gross receipts (DPGR) | 1 | 233,425. | 3,437,655. |
| 2 | Allocable cost of goods sold. If you are using the small business simplified overall method, skip lines 2 and 3 | 2 | 141,908. | 2,031,554. |
| 3 | Enter deductions and losses allocable to DPGR (see instructions) | 3 | 88,104. | 2,481,112. |
| 4 | If you are using the small business simplified overall method, enter the amount of cost of goods sold and other deductions or losses you ratably apportion to DPGR. All others, skip line 4 | 4 | | |
| 5 | Add lines 2 through 4 | 5 | 230,012. | 4,512,666. |
| 6 | Subtract line 5 from line 1 | 6 | 3,413. | -1,075,011. |
| 7 | Qualified production activities income from estates, trusts, and certain partnerships and S corporations (see instructions) | 7 | | |
| 8 | Add lines 6 and 7. Estates and trusts, go to line 9, all others, skip line 9 and go to line 10 | 8 | 3,413. | -1,075,011. |
| 9 | Amount allocated to beneficiaries of the estate or trust (see instructions) | 9 | | |
| 10a | **Oil-related qualified production activities income.** Estates and trusts, subtract line 9, column (a), from line 8, column (a), all others, enter amount from line 8, column (a). If zero or less, enter -0- here | 10a | 3,413. | |
| b | **Qualified production activities income.** Estates and trusts, subtract line 9, column (b), from line 8, column (b), all others, enter amount from line 8, column (b). If zero or less, enter -0- here, skip lines 11 through 21, and enter -0- on line 22 | 10b | | 0. |

| | | | |
|---|---|---|---|
| 11 | Income limitation (see instructions):<br>• Individuals, estates, and trusts. Enter your adjusted gross income figured without the domestic production activities deduction<br>• All others. Enter your taxable income figured without the domestic production activities deduction (tax-exempt organizations, see instructions) | 11 | |
| 12 | Enter the smaller of line 10b or line 11. If zero or less, enter -0- here, skip lines 13 through 21, and enter -0- on line 22 | 12 | |
| 13 | Enter 9% of line 12 | 13 | |
| 14a | Enter the smaller of line 10a or line 12 — 14a | | |
| b | Reduction for oil-related qualified production activities income. Multiply line 14a by 3% | 14b | |
| 15 | Subtract line 14b from line 13 | 15 | |
| 16 | Form W-2 wages (see instructions) | 16 | |
| 17 | Form W-2 wages from estates, trusts, and certain partnerships and S corporations (see instructions) | 17 | |
| 18 | Add lines 16 and 17. Estates and trusts, go to line 19, all others, skip line 19 and go to line 20 | 18 | |
| 19 | Amount allocated to beneficiaries of the estate or trust (see instructions) | 19 | |
| 20 | Estates and trusts, subtract line 19 from line 18, all others, enter amount from line 18 | 20 | |
| 21 | Form W-2 wage limitation. Enter 50% of line 20 | 21 | |
| 22 | Enter the smaller of line 15 or line 21 | 22 | 0. |
| 23 | Domestic production activities deduction from cooperatives. Enter deduction from Form 1099-PATR, box 6 | 23 | |
| 24 | Expanded affiliated group allocation (see instructions) | 24 | |
| 25 | **Domestic production activities deduction.** Combine lines 22 through 24 and enter the result here and on Form 1040, line 35; Form 1120, line 25; or the applicable line of your return | 25 | 0. |

LHA **For Paperwork Reduction Act Notice, see separate instructions.** Form **8903** (Rev. 12-2010)

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