

THE JAMES IRVINE FOUNDATION

EXPANDING

OPPORTUNITY

FOR THE PEOPLE

OF CALIFORNIA

ANNUAL REPORT FOR 2005

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The mission of **The James Irvine Foundation** is to expand opportunity for the people of California to participate in a vibrant, successful, and inclusive society. In pursuit of this mission, the Foundation is guided by the following goals: **advance** the educational and economic prospects of low-income Californians to create and share in the state's prosperity; **engage** a broad cross section of Californians in the civic and cultural life of their communities and the state; **enhance** mutual understanding and communication among diverse racial, ethnic, and socioeconomic groups; and **enrich** the state's intellectual and creative environment.

## FROM THE PRESIDENT AND CHIEF EXECUTIVE OFFICER

Communications practices can enhance the work of our grantee partners, raise awareness of critical issues facing California, and help us achieve our mission.

Foundations have often sought to operate “under the radar,” permitting their contributions to the public welfare to be reflected through the good work of the partners they are privileged to support. This admirable approach, borne out of modesty and acknowledging foundations’ important role as facilitators, has often led foundations to shy away from embracing proactive communications efforts to complement their grantmaking activity. Fortunately, this is a trend that is beginning to change.

At The James Irvine Foundation, we consider communications to be an important strategic tool in advancing our mission to expand opportunity for the people of California. As a public service institution, we have a responsibility to communicate fully the Foundation’s activities in a timely, transparent, and accessible manner. We also believe that the strategic application of communications practices can enhance the work of our grantee partners, raise awareness of critical issues facing California, and help us achieve our mission.

To this end, we are integrating our communications and program work in new and exciting ways. We are developing new communications-focused initiatives that apply communications practices to our program goals. Launched in 2006, The James Irvine Foundation Leadership Award, for example, is designed to communicate to state and local policymakers about promising approaches for addressing important state issues, ultimately contributing to better public policies.

Irvine is also working collaboratively with selected grantees that have significant communications opportunities. Our work with community foundations, for example, includes technical assistance to create marketing tools, build communications capacity, and to allow for best practices in communications to be shared with other grantees.

We also remain committed to supporting communications efforts that inform Californians about significant state policy issues. This commitment is realized through our commissioning of polling and research that informs policymakers, and through support for media coverage that deepens public understanding of the key challenges facing the state.

We believe that foundations have a powerful voice that can influence public dialogues in unique ways.

While much of our communications work will be accomplished in partnership with our grantees, we also believe that foundations have a powerful voice that can influence public dialogues in unique ways. We have sought opportunities for the Foundation to participate actively in public dialogues on the challenges facing California, by authoring op-ed articles, garnering speaking engagements, and participating in public forums. While it is important to protect the objectivity that foundations must uphold, we will continue to seek out opportunities to promote solutions to the state's key challenges.

All of these communications efforts are evolving as technology alters the communications landscape. Even our traditional communications efforts are being updated to reflect how today's Californians are consuming information. Historically, our annual reports served as the core institutional communications vehicle. However, they were often out-of-date soon after publication. Today, our Web site serves as our most important communications tool, allowing us to provide more timely information and communicate more effectively with our core audiences.

Accordingly, beginning this year our annual report will be produced as an online-only publication. This streamlined annual report focuses on our grants in 2005, an overview of investment activities and a report on our finances. It complements other materials that allow us to communicate in a more timely and comprehensive manner:

- Web site: Our Web site at [www.irvine.org](http://www.irvine.org) offers the most up-to-date description of our programs, priorities, grants, and other general information on the Foundation. In recent years, we have made numerous enhancements to the Web site, including a searchable grants database, an expanded publications section, regular letters from the President, and more comprehensive information on the Foundation's governance, evaluations, and finances.

- Irvine Quarterly (IQ): This quarterly e-newsletter, which reaches more than 6,000 subscribers, describes key initiatives, profiles grantee partners, offers useful tools and resources, and provides news about the Foundation and its work in California. IQ has permitted us to report in greater detail and with more frequency about the stories behind the grants we have made, bringing to life the activities of the Foundation and the impact of our partners.

• Publications: In 2005, we inaugurated a series called “Insight: Lessons Learned From Our Grantmaking Programs,” through which we publish evaluations of our programs and other reports related to Irvine’s grantmaking work. We will continue to use the Insight series to communicate key lessons learned and to write occasionally about important issues and trends in the nonprofit and philanthropic sectors.

These tools form a complementary set of approaches to communicate about the work of the Foundation and its grantee partners in a more timely, focused, and comprehensive way. In an era when communications are practically instantaneous and certainly omnipresent, it is incumbent upon us to revisit frequently our communications practices and approaches. We look forward to learning from these efforts and from all of you as we deepen our use of communications as a strategic tool to advance our mission of service as a philanthropic organization.

In closing, no report of Irvine’s activities in 2005 would be complete without noting the retirement of our board chair, Peter W. Stanley, President Emeritus of Pomona College. Beginning in 1997, Peter served the Irvine Foundation as a director with intelligence, grace, and distinction, and he assumed the chairmanship in 2003, at a time of transition and leadership change for the Foundation. His steady and dedicated stewardship these past several years were instrumental in many ways, and all of us on the board and staff will miss Peter’s keen intellect and thoughtful leadership. I am personally grateful to him for his partnership during a key period in this Foundation’s distinguished history.

Sincerely,

A handwritten signature in black ink, appearing to read "James E. Canales". The signature is fluid and cursive, with a large initial "J" and "C".

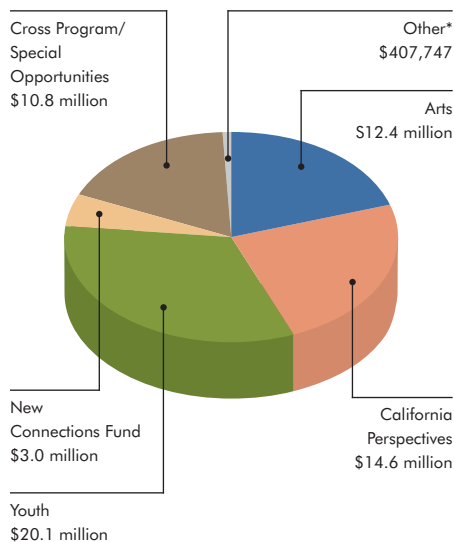
James E. Canales  
President and Chief Executive Officer  
August 2006

## THE JAMES IRVINE FOUNDATION 2005 GRANTS

In 2005, the Foundation approved 489 grants, totaling \$61.3 million. On the pages that follow, we present a detailed list of grants approved in 2005, in four sections:

### 2005 GRANTS ALLOCATION

Foundation Total  
\$61.3 million



\*Includes memberships, sponsorships and discretionary grants.

- Grants in our core program areas: Arts, California Perspectives, and Youth.
- Cross-program grants that relate to the goals of two or more program areas.
- Grants in our New Connections Fund, a program to fund unsolicited grant applications on a competitive basis.
- Grants to intermediary organizations that regrant Irvine dollars to other nonprofit organizations in their local communities.

For current information on our grantmaking programs, strategies, and priorities, please visit our Web site, [www.irvine.org](http://www.irvine.org).

### Grantseeker Guidelines

The James Irvine Foundation makes grants to a wide variety of nonprofit organizations, most of which receive funding through our three core grantmaking programs: Arts, California Perspectives, and Youth.

The Foundation primarily makes grants to organizations that are tax-exempt under section 501(c)(3) of the Internal Revenue Code. In addition, by provision of Mr. Irvine's Indenture of Trust, which established the Foundation in 1937, we are restricted to making grants to programs and organizations that directly benefit the people of California. Mr. Irvine also stipulated that grants from the Foundation "shall be used for such charities as do not enjoy substantial support through taxation." Based on this restriction, we refrain from making grants to public agencies or organizations that receive more than 50 percent of their revenue from government sources.

For current information about our grantmaking guidelines, please visit our Web site at [www.irvine.org](http://www.irvine.org).

## ARTS

The goal of the Arts program is to promote a vibrant and inclusive artistic and cultural environment in California.



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### Artistic Creativity

Promote the creation and reinterpretation of art, infusing the arts field with new ideas and methods of creative expression.

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#### ALLIANCE FOR CALIFORNIA TRADITIONAL ARTS FRESNO

To strengthen the capacity of the folk and traditional arts field and to support regranting for apprenticeships, technical assistance, and projects in California.

\$350,000 / 2 years

#### ALLIANCE FOR CALIFORNIA TRADITIONAL ARTS FRESNO

To support the transition of the California Traditional Arts Advancement Program, a statewide regranting program for folk arts and traditional culture in California, from the Fund for Folk Culture to the Alliance for California Traditional Arts.

\$31,000 / 6 months

#### ALLIANCE OF ARTISTS COMMUNITIES PROVIDENCE, R.I.

To support 20 California artists' residencies for Gulf Coast artists displaced by Hurricane Katrina, facilitating artistic exchange and interaction between Gulf Coast and California artists and the general public.

\$500,000 / 9 months

#### THE BAY AREA VIDEO COALITION SAN FRANCISCO

To support the Frameworks program, which provides aspiring, emerging, and established mediamakers with direct support, residencies, employment opportunities, mentorships, advanced training, and exhibition opportunities.

\$450,000 / 3 years

#### DANCE USA

WASHINGTON, D.C.

To develop and implement Dance/USA On Tour, a two-year series of management seminars, in the greater Los Angeles area.

\$50,000 / 2 years

#### LOS ANGELES MASTER CHORALE ASSOCIATION LOS ANGELES

To support artistic collaborations between California composers and master musicians to create multi-faceted and unique new music, blending the voices of the Los Angeles Master Chorale with complex non-Western musical traditions.

\$300,000 / 2 years

#### MAGIC THEATRE SAN FRANCISCO

To strengthen the play-development capacity of a consortium of 14 Bay Area theaters, and to commission, develop, and produce a significant body of new work from a wide range of playwrights.

\$300,000 / 3 years

#### MEET THE COMPOSER NEW YORK, N.Y.

To support the creation, presentation, and appreciation of new works by living composers throughout the state of California.

\$250,000 / 3 years

#### PLAYWRIGHTS PROJECT SAN DIEGO

To support an executive transition from founding leadership to new leadership, through the development and implementation of a strategic and public relations plan.

\$80,000 / 2 years



#### POETS & WRITERS

LOS ANGELES

To support writers through the California Readings/Workshops and California Voices programs, providing financial and technical support for writers participating in public literary events throughout California.

\$350,000 / 3 years

#### UKIAH PLAYERS THEATRE

UKIAH

To support the PlaceMeant Project: Stories of Why Where Matters, a multimedia, collaborative production.

\$75,000 / 2 years

#### THE Z SPACE STUDIO

SAN FRANCISCO

To support the Western Presenters Commissioning Initiative, resulting in the creation of 12 new works of touring theater in a broad spectrum of theatrical styles and cultural perspectives.

\$300,000 / 3 years

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#### Artists' Communities Initiative

Enhance the ability of under-represented visual artists from diverse communities in California to hone their craft, take artistic risk and experiment; and strengthen the organizational capacity of select artist residency programs in California to promote artistic development and creativity in the state.

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#### 18TH STREET ARTS CENTER

SANTA MONICA

For core operating and capacity-building support to expand the artist residency program through an increased number of residencies and an added exhibition opportunity for resident artists.

\$310,000 / 3 years

#### ALLIANCE OF ARTISTS COMMUNITIES

PROVIDENCE, R.I.

To support the work of California visual artists from diverse communities through California artist residency programs.

\$450,000 / 4 years

#### DJERASSI RESIDENT ARTISTS PROGRAM

WOODSIDE

For core operating and capacity-building support to strengthen the artist residency program.

\$250,000 / 3 years

#### THE EXPLORATORIUM

SAN FRANCISCO

For the development and launch of the new Research Residencies for California Artists program.

\$325,000 / 3 years

#### HEADLANDS CENTER FOR THE ARTS

SAUSALITO

For facility and equipment upgrades and core support.

\$350,000 / 3 years

#### KALA INSTITUTE

BERKELEY

For capacity-building and core operating support to provide residencies for California visual artists that include access to high-quality facilities and equipment, professional development, and exhibition opportunities.

\$265,000 / 3 years

#### MONTALVO ASSOCIATION

SARATOGA

To support residencies for artists from the Central Valley and Inland Empire, and for capacity-building support for the Sally and Don Lucas Artists Programs at the Montalvo Arts Center.

\$400,000 / 3 years

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#### Connection Through Cultural Participation

Support the active engagement of Californians from all socio-economic and ethnic backgrounds with quality art from a variety of sources and cultures.

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#### AMERICAN FRIENDS

##### SERVICE COMMITTEE

SAN FRANCISCO

For presentation and assessment of a third Tamajavi Festival, promoting the cultural traditions and interactions of differing immigrant and refugee groups in California's Central Valley.

\$125,000 / 2 years

#### COMMUNITY YOUTH PERFORMING

##### ARTS CENTER

SANTA BARBARA

For Viva El Arte De Santa Barbara!, presenting performing arts residencies designed to reach the traditionally underserved Spanish-speaking communities of Santa Barbara.

\$150,000 / 2 years

#### CORNERSTONE THEATER COMPANY

LOS ANGELES

To strengthen and expand the Cornerstone Institute, a theater training program in rural and urban California communities, and support a leadership transition for the organization.

\$420,000 / 40 months

**FORD THEATRE FOUNDATION**

LOS ANGELES

For the Community Audience Initiative, to increase participation of traditionally underserved communities in the performing arts.

\$300,000 / 3 years

**HEYDAY INSTITUTE**

BERKELEY

To produce a comprehensive anthology of literature from the Inland Empire, and associated outreach programs.

\$75,000 / 2 years

**LOS ANGELES CHAMBER ORCHESTRA SOCIETY**

LOS ANGELES

To support the artistic and infrastructure goals of the organization’s new strategic plan to raise the visibility and public profile of the orchestra.

\$350,000 / 3 years

**MUSEUM OF THE AFRICAN DIASPORA**

SAN FRANCISCO

For the development and implementation of a new conference and lecture series.

\$50,000 / 1 year

**OPERA PACIFIC**

SANTA ANA

For strategic planning and market research to inform and strengthen institutional and programmatic capacity.

\$100,000 / 16 months

**PACIFIC SYMPHONY ORCHESTRA**

SANTA ANA

For the New Music Initiative, supporting the presentation of work by contemporary American composers and providing access and education for diverse audiences.

\$200,000 / 3 years

**PERFORMING ARTS CENTER OF LOS ANGELES COUNTY**

LOS ANGELES

To expand the Informal Arts Initiative, focused on engaging broad and diverse audiences in non-professional art-making.

\$150,000 / 18 months

**RADIO BILINGUE**

FRESNO

To support Raíces: Art Moments on Radio, broadcasting Spanish-language radio segments throughout the Central Valley, introducing Latinos to the traditional folk arts of the Hmong, Filipino, and Latino cultures.

\$85,000 / 1 year

**SAN FRANCISCO COMMUNITY MUSIC CENTER**

SAN FRANCISCO

For a pilot project designed to increase student participation in the Inner City Young Musicians Program, providing music education for ethnically diverse high school students.

\$75,000 / 2 years

**SAN FRANCISCO PERFORMANCES**

SAN FRANCISCO

To support main-stage performances, symposia, master classes, mini-festivals, and the artists-in-residence program.

\$450,000 / 3 years

**SOCIAL AND PUBLIC ART RESOURCE CENTER**

VENICE

For the preservation and restoration of the Great Wall of Los Angeles mural, depicting a visual narrative history of California’s ethnic populations.

\$100,000 / 2 years



**SOUTHERN CALIFORNIA ASIAN AMERICAN STUDIES CENTRAL**

LOS ANGELES

For the Armed with a Camera Fellowship for Emerging Media Artists program, and to support a new marketing staff position.

\$150,000 / 3 years

**UNIVERSITY OF  
SOUTHERN CALIFORNIA**

LOS ANGELES

To expand Spotlight on the Arts, the arts reporting program of KUSC, with regional short features and regular hour-long arts programs.

\$300,000 / 3 years



**VENTURA COUNTY MUSEUM  
OF HISTORY AND ART**

VENTURA

To implement a marketing and capacity-building strategic plan to extend the museum's visibility and membership in the Ventura County community.

\$75,000 / 3 years

**WORLD ARTS WEST**

SAN FRANCISCO

To support a strategic planning process and for core support.

\$47,000 / 6 months

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**Arts Leadership**

Foster an environment in which arts and culture flourish in California through support to the state's largest premier cultural institutions and to leading arts organizations in the non-metropolitan areas of California.

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**LOS ANGELES OPERA**

LOS ANGELES

To present two innovative, world premiere commissions and a contemporary interpretation of a rarely produced repertory opera.

\$500,000 / 3 years

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**MUSEUM OF CONTEMPORARY ART  
SAN DIEGO**

LA JOLLA

For artistic programs and support for the expansion of MCASD Downtown.

\$500,000 / 3 years

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**OBERLIN DANCE COLLECTIVE**

SAN FRANCISCO

For DanceBridge, a collaborative program of the dance company, dance school, and ODC theater, to provide broad access to ODC's newly expanded programs in their new facility.

\$300,000 / 3 years

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**OLD GLOBE THEATRE**

SAN DIEGO

To establish a new artistic leadership structure to support a more comprehensive theater development and production process.

\$500,000 / 3 years

**TCC GROUP**

NEW YORK, N.Y.

For technical assistance for the Arts Regional Initiative to build the capacity of midsized arts organizations throughout California.

\$325,000 / 18 months

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**Special Projects**

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**AMERICAN COMPOSERS FORUM**

ST. PAUL, MINN.

For strategic planning and technical assistance for American Composers Forum Los Angeles.

\$22,000 / 6 months

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**ANGELS GATE CULTURAL CENTER**

SAN PEDRO

For strategic planning and technical assistance for Angels Gate Cultural Center.

\$20,000 / 1 year

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**ARTE AMERICAS MEXICAN  
ARTS CENTER**

FRESNO

To assist in the search for a new executive director.

\$12,000 / 6 months

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**CALIFORNIA ASSOCIATION  
OF MUSEUMS**

SANTA CRUZ

For the Museum Advocacy Initiative, a public education and advocacy program serving California museums.

\$50,000 / 2 years

**CALIFORNIA HISTORICAL SOCIETY**

SAN FRANCISCO

For a long-range strategic planning process and related organizational development efforts.

\$50,000 / 1 year

**FOUNDATION-ADMINISTERED PROJECT**

SAN FRANCISCO

For a Foundation-Administered Project to support research on the work life and creative development of working artists in Los Angeles and San Francisco Bay Area communities, with related dissemination activities.

\$15,000 / 8 months

**KALA INSTITUTE**

BERKELEY

To support a feasibility study and facility planning process.

\$14,000 / 5 months

**LINES CONTEMPORARY BALLET**

SAN FRANCISCO

To support an executive search.

\$26,000 / 2 months

**NORTHERN CALIFORNIA**

**GRANTMAKERS**

SAN FRANCISCO

To support the Arts Loan Fund.

\$50,000 / 2 years

**RICHMOND ART CENTER**

RICHMOND

To support transition and strategic planning efforts prior to engaging in an executive search.

\$10,000 / 3 months

**SOCIAL AND PUBLIC ART RESOURCE**

**CENTER**

VENICE

To support a convening and consultant assistance around plans for a new collaboration with Antioch University Los Angeles to develop a new low-residency MFA program in Public Art and Community Development.

\$15,000 / 6 months

**SOUTHERN CALIFORNIA**

**GRANTMAKERS**

LOS ANGELES

To conduct a survey of arts giving by public and private funding agencies in the Los Angeles region, charting trends from 1998 to 2004, to better understand arts funding in Southern California and promote effective funding strategies among grantmakers.

\$30,000 / 1 year

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**Communities Advancing**

**the Arts Initiative**

Build new sustainable funding streams for the arts in California through community foundations.

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**CALIFORNIA COMMUNITY**

**FOUNDATION**

LOS ANGELES

To develop a strategic plan for increasing private financial support of the arts in Los Angeles County and to build the organization's capacity to provide leadership in the arts field.

\$100,000 / 1 year

**THE COMMUNITY FOUNDATION**

RIVERSIDE

For a regranting initiative to support diverse cultural expressions and to implement a donor education and engagement program to increase arts-related philanthropy within Riverside County.

\$325,000 / 2 years

**WILLIAMS GROUP**

GRAND RAPIDS, MICH.

To create a learning community for the eight California community foundations participating in Communities Advancing the Arts and to create communications products to support local arts donor education and cultivation strategies.

\$580,000 / 32 months

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**57 GRANTS TOTALING \$12,412,000**

# CALIFORNIA PERSPECTIVES

The goal of the California Perspectives program is to improve decision-making on significant state issues by informing public understanding, promoting broader civic participation, and encouraging more effective state governance.



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## Informing Californians

Disseminate information and analyses about significant state issues and highlight solutions to important public concerns.

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### THE COMMONWEALTH CLUB OF CALIFORNIA

SAN FRANCISCO

To support educational programming on California governance issues, with broadcast distribution statewide.

\$400,000 / 2 years

### COMMUNITY TELEVISION OF SOUTHERN CALIFORNIA/KCET

LOS ANGELES

To support production of California Connected, a television and radio show designed to inform Californians about critical state issues.

\$1,000,000 / 1 year

### LEAGUE OF WOMEN VOTERS OF CALIFORNIA EDUCATION FUND

SACRAMENTO

To produce nonpartisan voter guides for the Nov. 8, 2005 special election, with distribution targeted to communities with low voting rates.

\$75,000 / 4 months

### LEAGUE OF WOMEN VOTERS OF CALIFORNIA EDUCATION FUND

SACRAMENTO

To support the Easy Voter Guide, which promotes civic participation through nonpartisan, user-friendly information on election issues.

\$200,000 / 15 months

### PACIFIC NEWS SERVICE

SAN FRANCISCO

To launch News from the New California news service, pilot an ethnic news media fellowship program, and conduct multilingual polling on California issues.

\$1,000,000 / 2 years

### RADIO BILINGUE

FRESNO

To increase Radio Bilingue's capacity to report on environmental policy issues from the Central Valley and to connect listeners to related civic engagement opportunities.

\$300,000 / 2 years

### REGENTS OF THE UNIVERSITY OF CALIFORNIA

OAKLAND

For the Institute of Governmental Studies to produce two research reports and conduct related press workshops on redistricting reform.

\$115,000 / 7 months

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## Infusing New Ideas and Perspectives for Effective Governance

Improve responsiveness and effectiveness of state and local governments through the development and dissemination of promising governance reforms.

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### BAY AREA ECONOMIC FORUM

SAN FRANCISCO

To conduct analyses on state governance and fiscal reforms, and to develop partnerships with other business and civic organizations to advance reform ideas.

\$75,000 / 9 months

### CALIFORNIA COMMUNITY FOUNDATION

LOS ANGELES

To support an external analysis of effective city service delivery, and responsive and accountable governing structures in the city of Los Angeles.

\$500,000 / 1 year

### CENTER FOR GOVERNMENTAL STUDIES

LOS ANGELES

To conduct a statewide survey to test public opinion about specific reforms of the ballot initiative process.

\$145,000 / 1 year

**NEW AMERICA FOUNDATION**

WASHINGTON, D.C.

To continue its California-based Irvine Fellows Program, which supports public policy writers and thinkers who are addressing California's most pressing issues.

\$2,500,000 / 3 years

**NEW AMERICA FOUNDATION**

WASHINGTON, D.C.

To establish a California-based Political Reform Program that will develop, publicize, and advance promising new ideas for state and local political and electoral reforms.

\$750,000 / 3 years

**POLICYLINK**

OAKLAND

To create a feasibility plan, with Resources Legacy Fund, for a multiyear campaign to improve the stability of the state's fiscal system.

\$60,000 / 10 months

**PUBLIC POLICY INSTITUTE OF CALIFORNIA**

SAN FRANCISCO

To conduct three PPIC Statewide Surveys on California initiatives and initiative reform, leading up to the November 2005 special election.

\$150,000 / 1 year

**PUBLIC POLICY INSTITUTE OF CALIFORNIA**

SAN FRANCISCO

To support a Sacramento conference on California's initiative process and a related public opinion survey.

\$150,000 / 3 months

**REGENTS OF THE UNIVERSITY OF CALIFORNIA**

OAKLAND

To evaluate reforming the initiative process in light of California's November 2005 special election.

\$20,000 / 2 months

**RESOURCES LEGACY FUND**

SACRAMENTO

To create a feasibility plan, with PolicyLink, for a multiyear campaign to improve the stability of the state's fiscal system.

\$60,000 / 10 months

**Mobilizing Californians**

Foster dialogues between under-represented communities and public officials on issues of concern and encourage higher voter participation.

**ASIAN LAW CAUCUS**

SAN FRANCISCO

To provide opportunities for low-income and immigrant Asian Pacific Islander Americans to engage with public officials on community concerns.

\$300,000 / 2 years

**ASIAN PACIFIC AMERICAN LEGAL CENTER OF SOUTHERN CALIFORNIA**

LOS ANGELES

To promote voting access for eligible immigrant voters and those with limited English proficiency through poll monitoring, trainings for community organizations, and analyses of related policies and practices.

\$200,000 / 2 years

**CENTER FOR COMMUNITY ADVOCACY**

SALINAS

To facilitate discussions among farm worker leaders and local public officials on housing issues.

\$200,000 / 2 years

**CENTER ON POLICY INITIATIVES**

SAN DIEGO

To foster low-income communities' participation in local government decision-making processes relating to land-use planning and economic development through information and trainings.

\$200,000 / 2 years

**COALITION LA**

LOS ANGELES

To involve low-income residents in efforts to increase safe, affordable housing in their neighborhoods.

\$75,000 / 2 years

**COMMON CAUSE**

LOS ANGELES

To coordinate and strengthen efforts by the California Voter Empowerment Circle (CalVEC) to encourage full civic participation and ensure fair and accessible elections.

\$75,000 / 1 year

**COMMUNITY COALITION FOR SUBSTANCE ABUSE PREVENTION & TREATMENT**

LOS ANGELES

To facilitate dialogues between low-income residents in South Central Los Angeles and public officials on neighborhood safety and other community issues.

\$300,000 / 2 years

**CRYSTAL STAIRS**

LOS ANGELES

To provide opportunities for low-income parents in Los Angeles to engage with public officials on issues related to quality child care.

\$200,000 / 2 years

**FOUNDATION-ADMINISTERED PROJECT**

SAN FRANCISCO

For a Foundation-Administered Project to support two convenings of Irvine voter education and mobilization grantees.

\$2,179 / 1 year

**INLAND CONGREGATION UNITED FOR CHANGE SPONSORING COMMITTEE**

SAN BERNARDINO

To involve residents in the cities of Riverside and San Bernardino and in the Coachella Valley in shaping public policies that affect their communities.

\$300,000 / 3 years

**LEADERSHIP EDUCATION  
FOR ASIAN PACIFICS**

LOS ANGELES

To support the Civic Leadership Institute, designed to develop the capacity of Asian Pacific Americans to serve as elected and appointed officials and community leaders.

\$200,000 / 2 years

**LOS ANGELES ALLIANCE  
FOR A NEW ECONOMY**

LOS ANGELES

To support the efforts of low-income communities to participate in land use planning and economic development decisions throughout Los Angeles County.

\$300,000 / 2 years

**STRATEGIC ACTIONS FOR A  
JUST ECONOMY**

LOS ANGELES

To foster low-income communities' participation in local government policies and practices related to safe and affordable housing.

\$150,000 / 2 years

**STOCKTON INTERFAITH SPONSORING  
COMMITTEE**

STOCKTON

To facilitate dialogues between community members and public officials in Lodi and Stockton on educational policies, housing availability, and other community concerns.

\$90,000 / 2 years

**UNIVERSITY OF  
SOUTHERN CALIFORNIA**

LOS ANGELES

To establish a leadership institute for African American clergy focused on enhancing civic participation among Los Angeles congregations.

\$400,000 / 2 years

**UNSTRUNG BOW SPIRITUAL  
RETREAT AND COMPASSIONATE  
MISSION MINISTRIES (DBA  
RELATIONAL CULTURE INSTITUTE)**

FRESNO

To facilitate dialogues between community members and public officials in Bakersfield, Fresno, and Visalia on educational policies and other community concerns.

\$250,000 / 2 years

**WORKING PARTNERSHIPS USA**

SAN JOSE

To engage low-income communities in Santa Clara County in efforts to improve transit services and promote accountable development policies, and to provide technical support to similar efforts in other parts of the state.

\$400,000 / 2 years

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**California Votes Initiative**  
Increase voter participation among infrequent voters in the San Joaquin Valley and the counties of Los Angeles, Orange, Riverside, and San Bernardino.

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**ASIAN PACIFIC AMERICAN LEGAL  
CENTER OF SOUTHERN CALIFORNIA**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity Asian Pacific Islander American voters in Los Angeles County, as part of the California Votes Initiative.

\$250,000 / 18 months

**CALIFORNIA PUBLIC INTEREST  
RESEARCH GROUP EDUCATION FUND**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity voters at six community colleges and two California State University campuses in Los Angeles County, as part of the California Votes Initiative.

\$300,000 / 18 months

**CALIFORNIA STATE UNIVERSITY,  
HAYWARD FOUNDATION**

HAYWARD

To develop an evaluation design for voter education and mobilization activities, as part of the California Votes Initiative.

\$50,000 / 4 years



**CALIFORNIA STATE UNIVERSITY,  
HAYWARD FOUNDATION**

HAYWARD

To conduct an evaluation of the California Votes Initiative, a multiyear project to improve voter participation among low-income and ethnic voters in the Central Valley and Southern California.

\$300,000 / 2 years

**CENTER FOR COMMUNITY ACTION  
AND ENVIRONMENTAL JUSTICE**

RIVERSIDE

To conduct nonpartisan voter education and mobilization activities directed to low-propensity voters in Riverside and San Bernardino Counties, as part of the California Votes Initiative.

\$275,000 / 18 months

**CENTRAL AMERICAN RESOURCE  
CENTER OF CALIFORNIA**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity voters in Los Angeles, as part of the California Votes Initiative.

\$225,000 / 18 months



**LOS ANGELES METROPOLITAN  
CHURCHES**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity voters in Los Angeles, Riverside, and San Bernardino Counties, as part of the California Votes Initiative.

\$265,000 / 18 months

**NALEO EDUCATIONAL FUND**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity Latino voters in Fresno, Los Angeles, Orange, Riverside, and San Bernardino Counties, as part of the California Votes Initiative.

\$400,000 / 18 months

**ORANGE COUNTY ASIAN PACIFIC  
ISLANDER COMMUNITY ALLIANCE**

GARDEN GROVE

To conduct nonpartisan voter education and mobilization activities directed to low-propensity Asian and Pacific Islander American voters in Orange, Riverside, and San Bernardino Counties, as part of the California Votes Initiative.

\$300,000 / 18 months

**PACIFIC INSTITUTE FOR COMMUNITY  
ORGANIZATION**

OAKLAND

To increase voting among low-propensity voters within PICO-affiliated congregations and surrounding communities in the Central Valley and the counties of Los Angeles, Orange, Riverside, and San Bernardino, as part of the California Votes Initiative.

\$255,000 / 6 months

**SOUTHWEST VOTER REGISTRATION  
EDUCATION PROJECT**

LOS ANGELES

To conduct an evaluation of voter education and mobilization activities in Latino communities within the Central Valley, Inland Empire, and Los Angeles County, as part of the California Votes Initiative.

\$25,000 / 1 year

**STRATEGIC CONCEPTS IN ORGANIZ-  
ING AND POLICY EDUCATION**

LOS ANGELES

To conduct nonpartisan voter education and mobilization activities directed to low-propensity voters in South and Central Los Angeles, as part of the California Votes Initiative.

\$300,000 / 18 months

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**Special Projects**

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**CHINESE AMERICAN VOTERS  
EDUCATION COMMITTEE**

SAN FRANCISCO

To support participation in the Harvard Business School's Strategic Perspectives in Non-profit Management program, in July 2005.

\$4,400 / 4 months

**FOUNDATION-ADMINISTERED PROJECT**

SAN FRANCISCO

For a Foundation-Administered Project to support public outreach and related communications activities associated with the launch of The James Irvine Foundation Leadership Award.

\$51,443 / 1 year

**IMMIGRANT LEGAL RESOURCE CENTER**

SAN FRANCISCO

To facilitate the search, hiring and transition of a new executive director.

\$35,000 / 14 months

**LIBRARY FOUNDATION OF  
LOS ANGELES**

LOS ANGELES

To support the development of a business plan for its monthly lecture series on civic and cultural affairs.

\$16,500 / 1 year

**PHILANTHROPY FOR ACTIVE  
CIVIC ENGAGEMENT**

DENVER, COLO.

To support Philanthropy for Active Civic Engagement in its organizational development and California program activities.

\$50,000 / 2 years

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**51 GRANTS TOTALING \$14,560,900**

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## YOUTH

The goal of the Youth program is to increase the number of low-income youth in California who complete high school on time and attain a postsecondary credential by the age of 25.



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### Expanding Pathways to College and Career

Promote academically rigorous career and technical education in California high schools.

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#### CABRILLO COLLEGE FOUNDATION

APTOS

To replicate the Watsonville Digital Bridge Academy model, an information technology training program for youth age 17-25, in community colleges in California.

\$250,000 / 18 months

#### ENVISION SCHOOLS

SAN FRANCISCO

To expand an innovative charter school model by supporting the startup of a campus in Oakland and an open-source online instructional library.

\$400,000 / 2 years

#### MPR ASSOCIATES

BERKELEY

To conduct a feasibility study centered on the role of career and technical education in California's high schools.

\$200,000 / 6 months

#### MPR ASSOCIATES

BERKELEY

For an initiative to provide support to innovative and effective career and technical education programs in California high schools.

\$1,750,000 / 18 months

#### NATIONAL ACADEMY OF SCIENCES

WASHINGTON, D.C.

To convene a planning meeting to increase understanding of the key research and policy issues surrounding career and technical education in California.

\$37,435 / 6 months

#### REGENTS OF THE UNIVERSITY OF CALIFORNIA

OAKLAND

To examine the intellectual underpinnings and challenges of academically rigorous career and technical education in high-school reform.

\$150,000 / 6 months

#### REGENTS OF THE UNIVERSITY OF CALIFORNIA

OAKLAND

To provide technical assistance in the development of academically rigorous career academies and job-placement learning experiences for high school students in west Contra Costa County.

\$175,000 / 2 years

#### UNIVERSITY OF THE PACIFIC

STOCKTON

To document, evaluate, and disseminate the practices of two public-private partnerships designed to increase high school retention and postsecondary transition at Sacramento High School.

\$120,000 / 9 months

#### WHITTIER EDUCATIONAL FOUNDATION

EL CERRITO

To prepare students for career and postsecondary options by developing academically rigorous career academies and job-placement learning experiences for high school students in west Contra Costa County.

\$600,000 / 2 years

**YOUTH RADIO**

BERKELEY

For the Pathways to Higher Education and Career Initiative, designed to increase high school retention and postsecondary attainment rates, and support transitions to high-wage employment for Youth Radio participants.

\$600,000 / 3 years

**Increasing Student Success**  
 Improve instruction and student support services in high schools and community colleges.

**AGILE MIND**

GRAPEVINE, TEXAS

For planning of an initiative to provide 15 to 20 high schools in the Central Valley and Inland Empire with technology-based educational tools to improve students' math achievement.

\$100,000 / 4 months

**AGILE MIND**

GRAPEVINE, TEXAS

To improve algebra and post-algebra mathematics achievement in California middle and high schools.

\$1,400,000 / 2 years

**BIG PICTURE COMPANY**

PROVIDENCE, R.I.

To support low-income youth from small innovative California public schools in their transition to and through college.

\$400,000 / 3 years

**CENTER FOR APPLIED LINGUISTICS**

WASHINGTON, D.C.

To plan a project to improve teaching in low-performing high schools serving English Language Learners in the Central Valley.

\$100,000 / 6 months

**MDRC**

NEW YORK, N.Y.

For planning of an initiative to integrate instructional supports and student services for low-income and minority students at community colleges in California.

\$200,000 / 6 months

**MDRC**

NEW YORK, N.Y.

For Student Support Partnership Integrating Resources and Education, a regranting initiative in California to support efforts to integrate instructional reforms with student support services that improve the academic achievement of low-income students.

\$3,500,000 / 3 years

**REGENTS OF THE**  
**UNIVERSITY OF CALIFORNIA**

OAKLAND

For a planning process to develop a dual-accreditation program for Mexican immigrant students in California high schools.

\$75,000 / 9 months

**SPRINGBOARD SCHOOLS**

SAN FRANCISCO

For integration of best practices for improving academic achievement of English Language Learners within a cohort of Central Valley high schools.

\$400,000 / 3 years

**UNITE-LA**

LOS ANGELES

To improve secondary school options for students in the Los Angeles Unified School District through the development and implementation of the College and Career Success Schools model.

\$500,000 / 2 years

**UNIVERSITY OF PITTSBURGH**

PITTSBURGH, PA.

To support the development of a rigorous high school math curriculum guide, model lessons, and related professional development for teachers focused on improving math instruction and increasing student academic achievement in Los Angeles public schools.

\$600,000 / 2 years

**UNIVERSITY OF SAN DIEGO**

SAN DIEGO

For support of activities to identify, train, and support community college leaders.

\$150,000 / 2 years

**WESTED**

SAN FRANCISCO

To conduct a site-selection process to identify one California school district, including four to five high schools, for the future coaching and professional development of teachers of English-learners following an innovative, field-tested instructional model.

\$50,000 / 6 months

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## Special Projects

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### AMERICAN ASSOCIATION OF COMMUNITY COLLEGES

WASHINGTON, D.C.

To convene a series of meetings of the Community College Affinity Partnership in California.

\$25,000 / 2 years

### CALIFORNIA STATE UNIVERSITY SACRAMENTO FOUNDATION

SACRAMENTO

To increase student success in California's Community Colleges through more efficient enrollment and course-taking patterns.

\$250,000 / 2 years

### CALIFORNIANS FOR JUSTICE EDUCATION FUND

OAKLAND

For an organizational assessment and strategic planning.

\$25,000 / 6 months

### FENTON COMMUNICATIONS

SAN FRANCISCO

To provide media relations for two conferences in Sacramento and Los Angeles focused on raising public awareness of high school dropout trends in California.

\$35,000 / 3 months

### FOUNDATION-ADMINISTERED PROJECT

SAN FRANCISCO

For a Foundation-Administered Project to support research, policy analysis, and program strategy development around out-of-school time and its implications for the academic engagement and success of high school students.

\$2,550 / 1 year

### FOUNDATION-ADMINISTERED PROJECT

SAN FRANCISCO

For a Foundation-Administered Project to research and assess the role of philanthropy in supporting and sustaining educational access, retention, and persistence of California's students ages 14-24.

\$19,365 / 1 year

### FOUNDATION FOR CALIFORNIA COMMUNITY COLLEGES

SACRAMENTO

To develop and implement a system-wide plan for California Community Colleges.

\$300,000 / 1 year

### HARVARD UNIVERSITY

CAMBRIDGE, MASS.

For two conferences in Los Angeles and the Bay Area to draw the attention of policy-makers, education advocates, and the public to the high school graduation rate crisis.

\$95,000 / 4 months

### INSTITUTE FOR TEACHING

BURLINGAME

To support outreach for a high school reform project in the Central Valley.

\$100,000 / 1 year

### REGENTS OF THE UNIVERSITY OF CALIFORNIA

OAKLAND

To conduct data analysis, develop and pilot new data analysis tools, and build necessary partnerships to help school leaders reform California's urban high schools, especially in the Los Angeles Unified School District.

\$150,000 / 1 year



### PUBLIC ADVOCATES

SAN FRANCISCO

For planning the expansion of the Campaign for Quality Education, a multiyear outreach and civic engagement project to address equity in education, and for ongoing training and technical assistance activities to community groups to advance local reform.

\$150,000 / 6 months

In addition to the preceding Youth program priorities, Youth grants were approved in 2005 in support of the following two concluding initiatives: the Campus Diversity Initiative and the Communities Organizing to Advance Learning (CORAL) Initiative.

**Campus Diversity Initiative**

To increase the success of under-represented students in higher education and better educate all students for leadership in an increasingly diverse state.



**CLAREMONT GRADUATE UNIVERSITY**

CLAREMONT

For the dissemination of findings from the evaluation of the Campus Diversity Initiative to the broader higher education field.

\$30,000 / 18 months

**FOUNDATION-ADMINISTERED PROJECT**

SAN FRANCISCO

For a Foundation-Administered Project to evaluate the Campus Diversity Initiative, assist grantees in assessing their own diversity needs and efforts, and facilitate information-sharing among institutions and researchers.

\$57,104 / 1 year

**Communities Organizing Resources to Advance Learning (CORAL) Initiative**

Increase the academic achievement of youth (with an emphasis on elementary school students) by involving students, families, schools, and organizations in high quality out-of-school learning opportunities.

**CATHOLIC CHARITIES OF SAN JOSE**

SAN JOSE

For continued implementation of the CORAL Initiative in San Jose.

\$1,200,000 / 1 year

**FRESNO CORAL**

FRESNO

For continued implementation of the CORAL Initiative in Fresno.

\$1,200,000 / 1 year

**NEW VISION PARTNERS**

PASADENA

For continued implementation of the CORAL Initiative in Pasadena.

\$720,000 / 1 year

**PUBLIC PRIVATE VENTURES**

PHILADELPHIA, PA.

To improve the quality and effectiveness of after-school programming in the CORAL Initiative in California, through the provision of management, technical assistance, communications and evaluation.

\$1,300,000 / 1 year

**SACRAMENTO CHILDREN'S HOME**

SACRAMENTO

For continued support of the CORAL Initiative in Sacramento.

\$1,200,000 / 1 year

**YOUNG MEN'S CHRISTIAN ASSOCIATION OF GREATER LONG BEACH**

LONG BEACH

For continued support of the CORAL initiative in Long Beach.

\$1,400,000 / 1 year

**41 GRANTS TOTALING \$20,116,000**

## CROSS-PROGRAM

The Foundation allocates a limited portion of its grantmaking budget to fund projects that relate to the goals of two or more program areas, or that relate to the Foundation's interests in its priority regions of the Central Valley, Inland Empire (Riverside and San Bernardino counties), and Los Angeles County.

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### Joint Grantmaking

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#### LIBRARY FOUNDATION OF LOS ANGELES LOS ANGELES

To support a weekly public radio show on current issues in Los Angeles civic life and to support cultural events in the greater Los Angeles area.

\$75,000 / 1 year

#### STANFORD UNIVERSITY STANFORD

For a set of research studies to examine and improve the efficiency and adequacy of California public education financing.

\$500,000 / 1 year

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### Arts Training Schools Cluster

Support low-income youth in making a successful transition to higher education and a career in creative industries.

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#### ARMORY CENTER FOR THE ARTS PASADENA

To expand the Art High program, providing low-income youth with specialized classes, professional training, and mentoring in the arts, to lead to future educational and professional development opportunities.

\$300,000 / 3 years

#### ART CENTER COLLEGE OF DESIGN PASADENA

To implement a targeted outreach and mentoring plan to increase the participation of financially disadvantaged and minority youth in Art Center's public programs.

\$450,000 / 3 years

#### CALIFORNIA COLLEGE OF THE ARTS SAN FRANCISCO

For Mentorship Class and Pre-College Programs, providing youth from low-income and underserved communities access to training and higher education opportunities through the arts.

\$450,000 / 3 years

#### CALIFORNIA INSTITUTE OF THE ARTS VALENCIA

To support the Community Arts Partnership Pre-College Mentoring Program to improve high school retention and to provide opportunities for training in the arts and future educational and professional development.

\$545,000 / 3 years

#### IDYLLWILD ARTS FOUNDATION IDYLLWILD

For the Arts Partners project, to provide instruction by artist-teachers in two Inland Empire public schools and to support the participation of the students in the Idyllwild Arts Summer Program.

\$225,000 / 3 years

#### OTIS ART INSTITUTE LOS ANGELES

To support the Otis Teens, Educators, Artists and Mentors Initiative to provide low-income Los Angeles youth with skill-based art and design education and to facilitate their entry into higher education or a career in creative industries.

\$425,000 / 40 months

#### SAN FRANCISCO ART INSTITUTE SAN FRANCISCO

For the City Studios Program, providing low-income Bay Area youth with a high-quality, rigorous arts training and education program to raise student achievement and advance their professional aspirations in the arts.

\$400,000 / 3 years

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## Fund for Leadership

### Advancement

Enhance the leadership capacities of the executive directors of selected grantee organizations.

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#### INLAND CONGREGATION UNITED FOR CHANGE SPONSORING COMMITTEE SAN BERNARDINO

To enhance the institution's political analysis and policy intelligence, fiscal stability, and staff development, as part of the Fund for Leadership Advancement.

\$50,000 / 18 months

#### OAKLAND COMMUNITY ORGANIZATIONS OAKLAND

To align organizational strategy, operations, and staffing with recent organizational growth and expanded sphere of influence, as part of the Fund for Leadership Advancement.

\$65,000 / 18 months

#### OMEGA BOYS CLUB OF SAN FRANCISCO SAN FRANCISCO

For improved governance and strategic communications, as part of the Fund for Leadership Advancement.

\$65,000 / 18 months

#### ORANGE COUNTY COMMUNITY FOUNDATION IRVINE

To leverage the position of the chief executive officer to focus on the organization's strategic direction and external constituents, as part of the Fund for Leadership Advancement.

\$75,000 / 18 months

#### SAN FRANCISCO ART INSTITUTE SAN FRANCISCO

For improved governance, organizational structure, and communications, as part of the Fund for Leadership Advancement.

\$75,000 / 1 year

#### SOUTHERN CALIFORNIA ASIAN AMERICAN STUDIES CENTRAL LOS ANGELES

For improved governance and executive management, as part of the Fund for Leadership Advancement.

\$70,000 / 18 months

#### TEATRO VISION SAN JOSE

To increase the prominence of the organization as a leading Latino theater through strategic marketing and audience development initiatives, as part of the Fund for Leadership Advancement.

\$50,000 / 18 months

#### VENTURA COUNTY MUSEUM OF HISTORY AND ART VENTURA

To align internal organizational structures and processes with planned physical and programmatic growth, as part of the Fund for Leadership Advancement.

\$50,000 / 18 months

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## Community Foundations Initiative II

Accelerate the growth and leadership of nine small and emerging community foundations in rural areas of California.

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#### THE COMMUNITY FOUNDATION OF MENDOCINO COUNTY UKIAH

To increase the philanthropic and leadership capacity of the Community Foundation of Mendocino County by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$325,000 / 3 years

#### COMMUNITY FOUNDATION OF THE NAPA VALLEY NAPA

To increase the philanthropic and leadership capacity of the Community Foundation of the Napa Valley by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$575,000 / 3 years

#### FOUNDATION-ADMINISTERED PROJECT SAN FRANCISCO

For a Foundation-Administered Project toward convening, technical assistance, and information-sharing among the nine California community foundations participating in the Community Foundations Initiative II.

\$48,281 / 5 months

#### FRESNO REGIONAL FOUNDATION FRESNO

To support a planning process for the Fresno Regional Foundation to assess organizational strengths and needs for capacity building, as part of the Community Foundations Initiative II.

\$35,000 / 4 months

#### FRESNO REGIONAL FOUNDATION FRESNO

To increase the philanthropic and leadership capacity of the Fresno Regional Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$525,000 / 33 months

#### FOUNDATION STRATEGY GROUP SAN FRANCISCO

To conduct a pilot study of three community foundations to help them identify strategic choices for sustainable growth, based on the Interactive Strategy Model, as part of the Community Foundations Initiative II.

\$195,000 / 6 months

**KERN COUNTY  
COMMUNITY FOUNDATION**  
BAKERSFIELD

To increase the philanthropic and leadership capacity of the Kern County Community Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$425,000 / 3 years

**SAN LUIS OBISPO COUNTY  
COMMUNITY FOUNDATION**  
SAN LUIS OBISPO

To increase the philanthropic and leadership capacity of the San Luis Obispo County Community Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$575,000 / 3 years

**SHASTA REGIONAL  
COMMUNITY FOUNDATION**  
REDDING

To increase the philanthropic and leadership capacity of the Shasta Regional Community Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$400,000 / 3 years

**SOLANO COMMUNITY FOUNDATION**  
FAIRFIELD

To increase the philanthropic and leadership capacity of the Solano Community Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$400,000 / 3 years

**STANISLAUS COMMUNITY  
FOUNDATION**  
MODESTO

To increase the philanthropic and leadership capacity of the Stanislaus Community Foundation by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$425,000 / 3 years

**LA PIANA ASSOCIATES**  
PIEDMONT

To assess the board development needs of the nine California community foundation participants in the Community Foundations Initiative II.

\$53,000 / 4 months

**LA PIANA ASSOCIATES**  
PIEDMONT

To support board development consultation and training for the nine California community foundation participants in the Community Foundations Initiative II.

\$200,000 / 15 months

**PLACER COMMUNITY FOUNDATION**  
AUBURN

To increase the philanthropic and leadership capacity of the Community Foundation of the Auburn Region by increasing its ability to attract new donors and address community needs, as part of the Community Foundations Initiative II.

\$425,000 / 3 years

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**Research and Communications  
About Priority Regions of  
California**

Enhance understanding by public and private funders of key trends and issues in the Central Valley, Inland Empire, and Los Angeles County.

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**DESERT COMMUNITY FOUNDATION**  
PALM DESERT

To support technology upgrades and the creation of new marketing materials.

\$60,000 / 1 year

**FOUNDATION-ADMINISTERED PROJECT**  
SAN FRANCISCO

For a Foundation-Administered Project to document and publicize philanthropic giving in California, itemizing geographic giving trends.

\$13,000 / 1 month

**PHILANTHROPIC RESEARCH**  
WILLIAMSBURG, VA.

To document philanthropic giving in California, drawing from publicly available 2003 data and itemizing geographic giving trends.

\$22,000 / 2 years

**PUBLIC POLICY  
INSTITUTE OF CALIFORNIA**  
SAN FRANCISCO

For a report projecting the population of the Inland Empire and its subregions in 2015, emphasizing educational attainment, the workforce, and citizenship.

\$150,000 / 1 year

**UNIVERSITY OF  
SOUTHERN CALIFORNIA**  
LOS ANGELES

To create an updated statistical profile of philanthropic giving in California, including the size, scope, and geographic reach of California foundations.

\$65,000 / 18 months

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## Special Projects

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### BOARDSOURCE

WASHINGTON, D.C.

For the distribution of 500 copies of *The Source: Twelve Principles of Governance That Power Exceptional Boards*, to nonprofit organizations in California.

\$5,100 / 2 months

### CAUSE COMMUNICATIONS

SANTA MONICA

To support a reprint of the toolkit on nonprofit branding and strategic communications.

\$18,000 / 6 months

### COMMUNITY FOUNDATION

#### SONOMA COUNTY

SANTA ROSA

To create a case study of the Healdsburg Area Affiliate fund, providing a reflective view of the benefits and trade-offs of creating an affiliate fund.

\$22,500 / 6 months

### COMPASSPOINT NONPROFIT SERVICES

SAN FRANCISCO

To redesign the organization's consulting business model and organizational structure.

\$50,000 / 6 months

### FOUNDATION-ADMINISTERED PROJECT

SAN FRANCISCO

For a Foundation-Administered Project to support communications activities that advance the goals of Irvine's strategic program initiatives.

\$46,108 / 3 months

### SACRAMENTO REGIONAL FOUNDATION

SACRAMENTO

To support a strategic planning process for the Sacramento Regional Community Foundation.

\$19,000 / 9 months

### SOUTHERN CALIFORNIA CENTER

#### FOR NONPROFIT MANAGEMENT

LOS ANGELES

To support an executive search and transition.

\$25,000 / 6 months

## SPECIAL OPPORTUNITIES

The Foundation's Special Opportunities Fund exists to respond to compelling one-time opportunities consistent with our mission, charter, and history. The Fund allows the Foundation to maintain flexibility in grantmaking activity while focusing the majority of Irvine's resources on a set of targeted strategies and priorities under its three core programs.

### CHRONICLE SEASON

#### OF SHARING FUND

SAN FRANCISCO

To support the 2005-2006 Season of Sharing Fund campaign.

\$75,000 / 1 year

### THE FOUNDATION CENTER

NEW YORK, N.Y.

To support technology upgrades in the San Francisco library and learning center.

\$25,000 / 1 year

### GREAT VALLEY CENTER

MODESTO

For core support to continue leadership development programs, provision of information on the Central Valley and collaborative projects, and to support a strategic alliance with the University of California at Merced.

\$1,000,000 / 2 years

### HISPANICS IN PHILANTHROPY

SAN FRANCISCO

To support the Funders' Collaborative for Strong Latino Communities, regrants to community-based nonprofits serving low-income Latino communities in the Central Valley, and to increase Hispanics in Philanthropy's internal capacity.

\$350,000 / 2 years

### HORIZONS FOUNDATION

SAN FRANCISCO

To increase the philanthropic and leadership capacity of the Horizons Foundation.

\$125,000 / 2 years

### POMONA COLLEGE

CLAREMONT

To establish a Chair in Linguistics and Philosophy.

\$300,000 / 1 year



## NEW CONNECTIONS FUND

The New Connections Fund has two goals: 1) to identify nonprofit organizations doing high-quality work that is well-aligned with selected program strategies, particularly in regions of priority interest, and 2) to increase the number of new organizations in Irvine's grants portfolio.



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### ARTS: Artistic Creativity

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#### A NOISE WITHIN

GLENDALE

For the development of a new play based upon Sinclair Lewis' novel, *Babbitt*, to be produced in the 2006/07 season.

\$25,000 / 1 year

#### ABHINAYA DANCE COMPANY OF SAN JOSE

SAN JOSE

For a collaborative performance by two masters of the Bharatanatyam style, a classical South Indian dance theater, to be performed in San Jose and Los Angeles.

\$20,000 / 1 year

#### ACTORS ALLIANCE OF SAN DIEGO

SAN DIEGO

To support workshop facilitators for the Play Development Workshop and provide artist stipends for the 2006 Actors Alliance Festival.

\$10,000 / 1 year

#### ARMAND HAMMER MUSEUM OF ART AND CULTURAL CENTER

LOS ANGELES

To support the development and creation of a public art project, *On the Borders of Life*, that explores gang-related activities and their effects on residents of East and South Los Angeles and involves the community in the work's installation and opening.

\$50,000 / 2 years

#### ART RE GRUP

SAN FRANCISCO

To support the premiere of *Wunderkabinet*, an experimental solo opera and media installation created by composer/sound artist Pamela Z in collaboration with media artists Jeanne Finley and John Muse.

\$19,000 / 1 year

#### AURORA THEATRE COMPANY

BERKELEY

For The Global Age Project, a series of six short new plays with themes that explore the state of the global community.

\$40,000 / 2 years

#### BLUE ROOM THEATRE

CHICO

To support the Fresh Ink Festival, a theatre festival that celebrates the creative process of theater.

\$15,000 / 2 years

#### THE CALIFORNIA EAR UNIT FOUNDATION

CASTAIC

To create and present four new music concerts as part of the Woven Voices Series, representing collaborations with cutting-edge composers and performers.

\$20,000 / 2 years

#### CHHANDAM CHITRESH DAS DANCE COMPANY

SAN FRANCISCO

To support the commissioning of a multi-ethnic collaboration between Chitresh Das, master of classical North Indian dance, and emerging tap dance artist Jason Samuels Smith, culminating in the premiere of *The India Jazz Suites* in San Francisco.

\$30,000 / 1 year

#### CHINESE CULTURAL PRODUCTIONS

SAN FRANCISCO

To support the development and production of *The Lost of the Red-Tasseled Spear*, a dance and musical production incorporating traditional Chinese ethnic and folk dance and music to examine the Chinese Cultural Revolution.

\$20,000 / 1 year

**COLLAGE DANCE THEATRE**

LOS ANGELES

Toward creation of a site-specific, multi-disciplinary performance at the Breed Street Shul in the Boyle Heights neighborhood of Los Angeles.

\$13,000 / 1 year

**DANCEART**

SAN FRANCISCO

To support Summerfest/dance, an annual dance festival presenting experimental work by emerging and mid-career choreographers in San Francisco.

\$25,000 / 1 year

**DIVERSIONARY THEATRE PRODUCTIONS**

SAN DIEGO

To support the First Look series of new play readings.

\$12,000 / 2 years

**EAGLE ROCK COMMUNITY CULTURAL ASSOCIATION**

LOS ANGELES

To support the production of a contemporary opera, *The Tree*, based on Shinto mythology.

\$25,000 / 1 year

**EVOEOKE DANCE THEATRE**

SAN DIEGO

To support a new dance theatre work, *Hip Hop is Everywhere*, that blends modern dance with urban hip hop and cultural dance forms.

\$30,000 / 1 year

**FRESNO METROPOLITAN MUSEUM OF ART HISTORY AND SCIENCE**

FRESNO

To support Off-Site, a series of contemporary art projects installed at various public locations in Fresno.

\$20,000 / 1 year

**JON SIMS CENTER FOR THE ARTS**

SAN FRANCISCO

To support the development of *Juana*, an opera exploring the life of the 17th century Mexican poet Sor Juana Inés de la Cruz.

\$15,000 / 2 years

**LOS ANGELES CHAMBER BALLET**

LOS ANGELES

Toward the creation and production of *L.A. Trip-tych*, a work combining music, dance and video, to create the sensation of driving through a myriad of ethnically diverse neighborhoods that make up the fabric of the city.

\$50,000 / 2 years

**MALASHOCK DANCE & COMPANY**

SAN DIEGO

In support of *Fathom: The Body as Universe*, a collaborative and multi-disciplinary new work by four artists using different art forms, drawing upon ancient Buddhist and Jewish themes.

\$50,000 / 2 years

**THE MARSH, A BREEDING GROUND FOR NEW PERFORMANCE**

SAN FRANCISCO

To support a comprehensive year-long performance development program for four theater artists, culminating in a festival of presented work.

\$40,000 / 1 year

**MELODY OF CHINA**

SAN FRANCISCO

To support two new commissions by Kui Dong and Duo Huang, featuring an ensemble of traditional Chinese instruments to be performed by the contemporary players of the Del Sol String Quartet in 2006.

\$20,000 / 1 year

**PACIFIC SERENADES**

LOS ANGELES

To commission and perform four new works, as part of the Border Crossings project, challenging classical and non-classical composers to enrich their work from new sources.

\$20,000 / 2 years

**PASADENA PLAYHOUSE**

STATE THEATER OF CALIFORNIA

PASADENA

To support a monthly new play development and staged reading series by diverse playwrights in the Balcony Theatre.

\$50,000 / 1 year

**PLAYWRIGHTS FOUNDATION**

SAN FRANCISCO

To support increased fees for artists and expanded rehearsal time during the 28th Annual Bay Area Playwrights Festival in August 2005.

\$12,000 / 1 year

**ROVA ARTS**

SAN FRANCISCO

To support the production and presentation of Improv:21, a series of "informances" on the art of musical improvisation in the 21st century.

\$10,000 / 2 years

**SAN DIEGO DANCE THEATER**

SAN DIEGO

To support Trolley Dances, a series of site-specific works by San Diego and Tijuana-based choreographers and dancers, to be performed along the trolley line between the two cities.

\$25,000 / 1 year

**SAN FRANCISCO CHAMBER ORCHESTRA**

SAN FRANCISCO

To present Fiesta de Tambores, a program of music by Latin American composers, in collaboration with the 2006 San Francisco International Arts Festival.

\$15,000 / 1 year

**SAN FRANCISCO INTERNATIONAL ARTS FESTIVAL**

SAN FRANCISCO

To support four collaborative projects featuring Bay Area artists paired with international peer artists, to be presented at the 2005 San Francisco International Arts Festival.

\$10,000 / 1 year

**SAN JOSE JAZZ SOCIETY**

SAN JOSE

To support the 2005 and 2006 Annual Comcast San Jose Jazz Festival, presenting new music by emerging jazz musicians, using electronic programming and instrumentation.

\$30,000 / 2 years

**SHOTGUN PLAYERS**

BERKELEY

To develop and present the community-based Lorin District Project that discovers and celebrates the diverse history of the South Berkeley neighborhood where the theater is based.

\$25,000 / 1 year

**STAGE 3 THEATRE COMPANY**

SONORA

For the Festival of New Plays, to engage the local residents of Tuolumne County in new play development, from script to stage production, involving at least 100 residents in all stages of the process.

\$19,000 / 2 years

**SUSHI**

SAN DIEGO

To support the 10 in 10: East Meets West Performance Festival, featuring 10 contemporary works during a 10-day period in April 2006.

\$18,000 / 1 year

**THEATRE FOR CHILDREN**

SACRAMENTO

To support Theatre Fast Forward, a comprehensive commissioning, development and staging project for a new work by contemporary playwright, Kira Obolensky.

\$50,000 / 1 year

**THEATRE OF YUGEN**

SAN FRANCISCO

For the development and production of The Cycle Plays, five plays presenting Western stories and music within traditional constraints of Japanese Noh art.

\$25,000 / 2 years

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**ARTS: Connection Through Cultural Participation**

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**24TH STREET THEATRE COMPANY**

LOS ANGELES

To support Teatro Nuevo, an audience development initiative designed to increase participation by the Latino community in Los Angeles through the establishment of a Latino Resident Theatre Company.

\$20,000 / 2 years

**ARTSCHANGE**

RICHMOND

For the multi-media exhibition Stitches in Time, Dialogues on Race, Culture and Inclusion, to document and present the migration stories and cultural identities of the diverse communities of Richmond.

\$10,000 / 1 year

**ARTWALLAH**

VENICE

For the ArtWallah Festival, presenting contemporary expressions of the art and culture of the South Asian diaspora.

\$10,000 / 1 year

**ASIAN PACIFIC SELF-DEVELOPMENT AND RESIDENTIAL ASSOCIATION**

STOCKTON

To support the Rhythmic Quilt Dance Project, bringing together youth of diverse ethnic backgrounds to research, learn and perform traditional dances from their respective cultures.

\$30,000 / 2 years

**BERKELEY SOCIETY FOR THE PRESERVATION OF TRADITIONAL MUSIC**

BERKELEY

For the development and implementation of a marketing and outreach campaign to attract and better serve the diverse communities of the San Francisco Bay Area with folk and traditional music programming.

\$25,000 / 1 year

**CENTER FOR THE STUDY OF POLITICAL GRAPHICS**

LOS ANGELES

To support the second phase of Political Graphics ONLINE, a preservation and access project involving the digitization and cataloging of 1,400 posters that represent historical and contemporary issues facing diverse communities of Southern California.

\$20,000 / 2 years

**CROCKER ART MUSEUM ASSOCIATION**

SACRAMENTO

To support FreshA.I.R., an artists residency and public outreach program designed to create stronger connections between artists of color and Sacramento's diverse communities.

\$30,000 / 2 years

**DANCE FOR POWER**

STOCKTON

To present the Stockton Multicultural Performing Arts Series to build cross-cultural understanding through the presentation of artistic traditions representative of the ethnic and cultural diversity of the Central Valley.

\$40,000 / 1 year

**DANCERS GROUP**

SAN FRANCISCO

To support a 10-day festival of free dance events in the San Francisco Bay Area, including the Open Dance Studios program, which allows individual artists, venues, and organizations to highlight their programming in their own neighborhoods.

\$12,000 / 2 years

**DOOR-DOG MUSIC PRODUCTIONS**

SAN FRANCISCO

For the development and presentation of the Nowroz Project, bringing together master artists from six Middle Eastern and Central Asian ethnic communities to present music, dance, poetry and film in celebration of Nowroz, or new year.

\$30,000 / 1 year

**EASTSIDE ARTS ALLIANCE**

OAKLAND

To support the Malcolm X JazzArts Festival, a year-round season of multicultural jazz presentations and workshops for the ethnically diverse community of East Oakland.

\$30,000 / 1 year

**FRESNO CITY AND COUNTY HISTORICAL SOCIETY**

FRESNO

To support The Hmong of Central California: A Culture in Transition, a traveling photographic exhibition and historical archive of the Central Valley Hmong Refugee Community.

\$35,000 / 2 years

**GALERIA STUDIO 24**

SAN FRANCISCO

To develop and present three intergenerational and cross-historical thematic exhibitions, showcasing post 1970's work of Latino artists in California, in celebration of Galeria's 35th Anniversary.

\$25,000 / 1 year

**GEFFEN PLAYHOUSE**

LOS ANGELES

For the Community Representatives Engaged in Active Theater Education (CREATE) program, an outreach program for cultural and social service organizations in LA, that provides free access to productions and interactive workshops at the Geffen Playhouse.

\$25,000 / 2 years

**GOLDEN THREAD PRODUCTIONS**

SAN FRANCISCO

To support the production and presentation of ReOrient, an annual festival of plays exploring Middle Eastern culture.

\$10,000 / 1 year

**HEALDSBURG JAZZ FESTIVAL**

HEALDSBURG

For the 2005 and 2006 presentations of Jazz Masters, free public concerts of Latin and Pan-Asian jazz at the Healdsburg Jazz Festival, including expanded outreach to the local Latino communities of Sonoma County.

\$20,000 / 2 years

**INYO COUNCIL FOR THE ARTS**

BISHOP

To support the Millpond Music Festival, promoting the cultural heritage of the diverse communities of Inyo County and the Eastern Sierra region through music.

\$28,000 / 1 year

**KHMER ARTS ACADEMY**

LONG BEACH

To support the Classical Dance Training Program, a series of free, year-round workshops for the Cambodian refugee community of Greater Long Beach.

\$38,000 / 2 years

**KVIE**

SACRAMENTO

To produce documentary programs celebrating the art, culture, and history of the Central Valley through the adaptation of three Heyday Press books.

\$35,000 / 2 years

**LIBRARY FOUNDATION OF LOS ANGELES**

LOS ANGELES

To support ALOUD at Central Library, a series of author talks, panel discussions, performances, and documentary screenings, to encourage dialogue and inquiry, inspire new ideas, and foster a sense of community in Los Angeles.

\$25,000 / 1 year

**LONG BEACH MUSEUM  
OF ART FOUNDATION**

LONG BEACH

To expand Free Fridays, an audience out-reach program targeting specific Los Angeles communities through special programming and increased marketing efforts.

\$30,000 / 1 year

**LONG BEACH SYMPHONY  
ASSOCIATION**

LONG BEACH

For the production of *Dos Visiones*, a cross-cultural concert presenting the permanent collection of the Museum of Latin American Art through a new orchestral work, as part of an audience development program focused on the Long Beach Latino community.

\$10,000 / 1 year

**MADERA COUNTY ARTS COUNCIL**

COARSEGOALD

To implement the findings of a recent cultural survey of the Latino population of Madera County through the presentation of a multicultural arts festival of traditional art forms reflecting the diverse cultures within the Madera County community.

\$12,000 / 1 year

**MARIPOSA COUNTY ARTS COUNCIL**

MARIPOSA

For the 2006 Mariposa Storytelling Festival, a three-day festival and series of touring performances to geographically isolated and rural counties of the Central Valley.

\$15,000 / 1 year

**MEDIA ARTS CENTER SAN DIEGO**

SAN DIEGO

For *Tu Cine!*, a multi-faceted audience development project designed to increase participation in media arts activities by the underserved Spanish-speaking and Latino communities in San Diego County.

\$25,000 / 1 year

**MILLARD SHEETS GALLERY**

POMONA

To support a six-week exhibition of Latino Artists of the Inland Empire, a collaborative exhibition between Millard Sheets Gallery and the Riverside Art Museum.

\$40,000 / 1 year

**MOUNT SAINT MARY'S COLLEGE**

LOS ANGELES

To present four community mini-festivals in Los Angeles and the Inland Empire as part of the Chamber Music in Historic Sites concert series.

\$30,000 / 2 years

**RAMONA PAGEANT ASSOCIATION**

HEMET

To support the 83rd season of *Ramona*, a production that explores the shared early California history of the indigenous peoples of the San Jacinto Valley, Mexican settlers, and Anglo pioneers.

\$30,000 / 1 year

**SACRAMENTO YOUTH SYMPHONY**

SACRAMENTO

To support a community-based production and presentation of *Survival and Triumph: Music of the Holocaust Era*, exploring the personal stories, history, and relevance of the Holocaust.

\$20,000 / 2 years

**SAN BERNARDINO SYMPHONY  
ASSOCIATION**

SAN BERNARDINO

To present *Symphonic Variations*, a concert designed to encourage access to symphonic music by non-traditional arts attendees.

\$20,000 / 1 year

**SAN FRANCISCO LIVE ARTS**

SAN FRANCISCO

To support a world music festival featuring local and international artists whose music reflects and celebrates the cultural diversity of the San Francisco Bay Area.

\$10,000 / 1 year

**SANTA CECILIA OPERA AND  
ORCHESTRA ASSOCIATION**

LOS ANGELES

To develop and launch a new concert series celebrating Latino culture in Los Angeles to increase audiences for classical music among the Latino community.

\$40,000 / 2 years

**SIERRA REPERTORY THEATRE**

SONORA

To provide the opportunity for audiences to access diverse, high-quality theatrical productions featuring professional guest artists in the underserved, rural areas of the Sierra Nevada and Central Valley.

\$25,000 / 2 years

**SUMMERDANCE SANTA BARBARA**

SANTA BARBARA

To support two choreographers as artists in residence during Summerdance, an annual dance festival to engage individual artists and the broader community in the process of creation and production of contemporary dance performance.

\$40,000 / 2 years

**VALLEY PUBLIC TELEVISION**

FRESNO

To support the production of Valley Art Textures...Traditions, which showcases the diverse cultural arts of the Central Valley.

\$35,000 / 1 year

**YERBA BUENA ARTS & EVENTS**

SAN FRANCISCO

For Music in the Gardens 101, a series of free multicultural music concerts, presented as part of an ongoing marketing and audience development strategy.

\$26,000 / 1 year

**YOUNG AUDIENCES OF SAN DIEGO**

SAN DIEGO

To support the inter-generational Arts For Life-Family Arts Connection program to present monthly, interactive, and culturally diverse artistic performances.

\$30,000 / 2 years

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**ARTS: Film Festivals**

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**AMERICAN INDIAN FILM INSTITUTE**

SAN FRANCISCO

For the American Indian Film Festival, to support community outreach efforts and the Tribal Touring Program.

\$25,000 / 2 years

**CENTER FOR ASIAN AMERICAN MEDIA**

SAN FRANCISCO

For the San Francisco International Asian American Film Festival, to enhance marketing and community outreach.

\$23,000 / 1 year

**FRAMELINE**

SAN FRANCISCO

For Frameline30, the 30th annual San Francisco International LGBT Film Festival, to support community outreach and build awareness of diverse viewpoints.

\$20,000 / 1 year

**INDEPENDENT FEATURE PROJECT WEST**

BEVERLY HILLS

For the 2006 Los Angeles Film Festival, to expand the audience for independent film through community-based outreach and present the diverse perspectives of independent film artists.

\$18,000 / 1 year

**LATINO FILM FESTIVAL OF MARIN**

SAN RAFAEL

For the International Latino Film Festival – San Francisco Bay Area, to present screenings in non-traditional venues and community-based cultural organizations.

\$20,000 / 2 years

**OUTFEST**

LOS ANGELES

To support Fusion: The Los Angeles LGBT People of Color Film Festival.

\$25,000 / 2 years

**PALM SPRINGS INTERNATIONAL**

FILM FESTIVAL

PALM SPRINGS

For Cine Latino, showcasing Latino cinema as part of the 2006 Palm Springs International Film Festival.

\$20,000 / 1 year

**PAN AFRICAN FILM FESTIVAL**

BEVERLY HILLS

For the 2006 Pan African Film Festival, to support community outreach and education in Los Angeles.

\$15,000 / 1 year

**SAN FRANCISCO JEWISH**

FILM FESTIVAL

SAN FRANCISCO

To expand festival programming beyond the city of San Francisco, reaching new and diverse Bay Area audiences.

\$20,000 / 1 year

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**CALIFORNIA PERSPECTIVES:  
Mobilizing Californians**

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**CALIFORNIA BLACK WOMEN'S  
HEALTH PROJECT**

INGLEWOOD

To provide women with trainings on civic participation and opportunities to connect to public officials about health policy.

\$50,000 / 2 years

**CALIFORNIA COALITION FOR RURAL  
HOUSING PROJECT**

SACRAMENTO

To utilize dialogues between low-income tenants and local elected officials to develop affordable housing preservation strategies in the Greater Sacramento Area.

\$50,000 / 2 years

**CALIFORNIANS TOGETHER**

LONG BEACH

To connect parents with public officials for discussions about educational policies affecting English-learning and immigrant students.

\$30,000 / 1 year

**EAST L.A. COMMUNITY CORPORATION**

LOS ANGELES

To support a series of community forums with local public officials on economic development, education, and health care policies.

\$35,000 / 1 year



**COMMUNITY DEVELOPMENT INSTITUTE**

PALO ALTO

To include community members in local policymaking related to economic development and land use in San Francisco's South of Market neighborhood.

\$30,000 / 1 year

**LOW-INCOME FAMILIES EMPOWERMENT THROUGH EDUCATION**

OAKLAND

To involve parents in the Central Valley and Los Angeles in discussions with public officials about welfare and related policies.

\$50,000 / 1 year

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**YOUTH: College Knowledge for Youth and Their Families**

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**A PLACE CALLED HOME**

LOS ANGELES

To provide low-income African American and Latino youth and their families in South Los Angeles with guidance and counseling regarding college preparation and enrollment.

\$50,000 / 2 years

**AL WOOTEN JR. YOUTH AND ADULT CULTURAL-EDUCATIONAL CENTER**

LOS ANGELES

To prepare low-income African American youth from South Central Los Angeles for high school completion and postsecondary education through the CollegeTrack project.

\$45,000 / 1 year

**BARRIO LOGAN COLLEGE INSTITUTE**

SAN DIEGO

To support academic counseling and college preparation assistance to low-income Latino, first-generation college-going youth and their families in San Diego.

\$40,000 / 1 year

**BOYS AND GIRLS CLUB OF TULARE COUNTY**

VISALIA

To raise the awareness of low-income Latino and African American youth and their families in Tulare County about college and financial aid opportunities.

\$30,000 / 15 months

**BOYS AND GIRLS CLUBS OF THE NORTH VALLEY**

CHICO

To promote college preparation and planning for low-income and first-generation college-going youth in Butte County.

\$45,000 / 2 years

**CHICANO AND LATINO YOUTH LEADERSHIP PROJECT**

SACRAMENTO

To provide information and other supports through regional institutes to increase awareness and promote college enrollment by low-income Latino high school students in the San Joaquin and San Fernando Valleys.

\$20,000 / 2 years

**COLLEGE BOUND — DOLLARS FOR ACHIEVERS**

CERRITOS

To prepare first-generation college-going youth and their families for postsecondary education, through the First Generation Success program, specifically addressing academic and cultural barriers.

\$27,000 / 1 year

**COURT-APPOINTED SPECIAL ADVOCATE**

SANTA ANA

To prepare low-income foster youth in Orange County for postsecondary education, promote academic persistence, and assist with college preparation and enrollment.

\$50,000 / 2 years

**COURT-APPOINTED SPECIAL  
ADVOCATES OF SAN LUIS OBISPO  
COUNTY**

SAN LUIS OBISPO

To prepare low-income foster youth in San Luis Obispo County for postsecondary education, assist with college preparation and enrollment, and link youth to appropriate financial and social supports.

\$48,000 / 2 years

**FAMILIES IN SCHOOLS**

LOS ANGELES

To support the Family College Counselor initiative to promote college preparedness among low-income, first-generation college-going youth and their families.

\$45,000 / 1 year

**FIRST PLACE FUND FOR YOUTH**

OAKLAND

For the Healthy Transitions Project to promote economic stability through academic retention, degree attainment, and career readiness of transitioning low-income foster youth in the San Francisco Bay Area.

\$50,000 / 2 years

**FOUNDATION FOR A COLLEGE  
EDUCATION**

EAST PALO ALTO

For the College Bound Program to support academic preparation and college awareness and planning of low-income minority youth in East Palo Alto.

\$50,000 / 1 year

**THE FRIENDSHIP CLUB**

NEVADA CITY

For the Bright Futures Project, to provide academic support and college counseling to promote the pursuit of postsecondary education by low-income, at-risk high school girls in Nevada County.

\$25,000 / 2 years

**FUTURE LEADERS OF AMERICA**

SANTA BARBARA

To support low-income Latino immigrant youth and their families in Ventura and Santa Barbara counties to prepare for postsecondary education, with an emphasis on increasing parent and family roles as advocates in the public education system.

\$45,000 / 1 year

**MK LEVEL PLAYING FIELD INSTITUTE**

SAN FRANCISCO

For the Math and Science Honors Academy, to increase competency and mastery in math and science of minority low-income high school students in the San Francisco Bay Area and promote students' pursuit of postsecondary study or careers in related fields.

\$50,000 / 1 year

**NIGHT BASKETBALL AND BOOKS**

PASADENA

To implement an educational case management system for low-income Latino and African American families to promote high school completion, college preparedness, and postsecondary enrollment.

\$10,000 / 1 year

**ORANGE COUNTY ASIAN PACIFIC  
ISLANDER COMMUNITY ALLIANCE**

GARDEN GROVE

To provide comprehensive educational case management to low-income, first-generation college-going South East Asian and Pacific Islander youth and their families to prepare for the academic, financial, and cultural transitions of postsecondary enrollment.

\$50,000 / 2 years

**RYMAN CARROLL FOUNDATION**

LOS ANGELES

For the Expanding Opportunities for Talented Urban Youth initiative, to support college planning workshops and related resources to prepare low-income high school youth in Los Angeles for postsecondary education and careers in art.

\$45,000 / 2 years

**SHERMAN HEIGHTS  
COMMUNITY CENTER**

SAN DIEGO

For the PODER Project, to provide low-income Latino high school youth in San Diego with educational counseling and academic support to complete high school and enroll in college.

\$20,000 / 1 year

**YOUNG WOMEN'S  
CHRISTIAN ASSOCIATION**

SAN DIEGO

To expose low-income youth and their families living in transitional public housing in San Diego to postsecondary education, with an emphasis on how to prepare for college and access financial aid.

\$30,000 / 2 years

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**106 GRANTS TOTALING \$3,000,000**



## REGRANTING

The Foundation seeks to extend the reach and effectiveness of its grant-making by tapping the expertise, local knowledge, and infrastructure of intermediary organizations that regrant Irvine dollars to smaller organizations. The use of intermediary organizations allows Irvine to reach a more diverse group of grantee organizations and, as a result, more effectively advance our goals.



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**Irvine's original grants to these intermediary organizations might have been awarded in a previous year. We present in this section regranting of Irvine dollars that took place in 2005. Regranting totals for each intermediary organization have been rounded to the nearest \$1,000.**

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### AMERICAN COMPOSERS FORUM \$65,000

Los Angeles Area Chapter  
Andrew Durkin/The Industrial Jazz Group  
Jennifer Roth/ Los Angeles Flute Orchestra  
SF Bay Area Chapter  
Left Coast Chamber Ensemble  
San Francisco Electric Music Festival  
Omid Zoufonoun & the Ahimsa Orchestra  
Cultural Odyssey  
SHIFT Physical Theater  
New Music Bay Area  
EmSpace Dance Company  
Quantum Opera

### CHARLES AND HELEN SCHWAB FOUNDATION \$350,000

Bill Wilson Center  
Center for Venture Philanthropy  
Fred Finch Center  
First Place Fund for Youth  
Larkin Street Youth Center  
Tri-City Homeless Coalition

### THE COMMUNITY FOUNDATION \$137,000

Arts Council of Big Bear Valley  
Ballet Folklórico de Riverside  
Chaffey Community Art Association  
Desert Academy of the Arts Foundation  
Elsinore Valley Arts Network  
Fine Arts Network  
High Desert Cultural Arts Foundation  
High Desert Living Arts Center  
Historical Glass Museum Foundation  
Hmong Archives and Culture Center  
Idyllwild Master Chorale  
Inland Chorale Music Education, Inc.

Inland Dance Theatre, Inc.  
Moreno Valley Community Band  
Morongo Basin Cultural Arts Council  
Murrieta Repertory Theater  
The New Gang on the Corner Chorus  
Palm Springs Opera Guild of the Desert  
Raincross Chorale  
Redlands Art Association  
Riverside African-American Historical Society  
Riverside Community Arts Association  
Riverside Community Band  
Riverside Community Players  
Riverside Dickens Festival  
Riverside Little Opera  
Shenanigans Youth Theatre Group  
Temecula Vintage Singers  
Twentynine Palms Artists Guild  
Windsong Southland Chorale

### COMMUNITY FOUNDATION FOR MONTEREY COUNTY \$62,000

Aromas Arts Collaborative  
Arts Council for Monterey County  
Big Sur Arts Initiative  
California State University, Monterey Bay (CSUMB)  
Camerata Singers  
Carmel Bach Festival  
Chamber Music Monterey Bay  
Film Arts Foundation  
First Night Monterey  
Monterey Museum of Art  
Monterey County Symphony  
Monterey County Youth Museum  
Monterey Jazz Festival  
Monterey Opera Association  
Monterey Public Library  
Pacific Repertory Theatre  
South Monterey County Center for the Performing Arts  
SpectorDance

COMMUNITY FOUNDATION  
OF SONOMA COUNTY

\$53,000

Arts Council of Sonoma County  
Luther Burbank Center for the Arts

CULTURAL COUNCIL OF SANTA CRUZ  
COUNTY

\$36,000

Aza  
Esperanza Del Valle  
Japanese Cultural Fair  
Mountain Parks Foundation  
The Scandinavian Cultural Center  
Watsonville Taiko

THE EAST BAY COMMUNITY  
FOUNDATION

\$14,000

ArtsChange  
Axis  
Berkeley Repertory Theatre  
Berkeley Symphony  
California Shakespeare Theater  
Eastside Arts Alliance

HUMBOLDT AREA FOUNDATION

\$35,000

Barbara Domanchuk  
Bridgeville Elementary School  
Burnt Ranch Elementary School District  
Del Norte Association for Cultural Awareness  
Freshwater and Garfield School Districts  
Mateel Community Center  
Sonya Fe  
Thao L. Khac  
The Trinity Players

LIBERTY HILL FOUNDATION

\$385,000

A New Way of Life Re-Entry Program  
African-American Parent/Community  
Coalition for Educational Equity  
Association of Community Organizations  
for Reform Now  
California Childcare Providers for Action  
Californians for Justice Education Fund  
Clergy and Laity United for Economic Justice  
Coalition for Economic Survival  
Coalition for Humane Immigrant Rights of  
Los Angeles  
Coalition L.A.  
Collective SPACE  
Community Asset Development Re-Defining  
Education  
Community Coalition  
Da'hui Man'gu Community Land Trust  
Ex-Offender Action Network  
Faith Communities for Families and Children  
Families to Amend California's Three Strikes  
Garment Worker Center  
Greater Long Beach Interfaith Community  
Organization  
Hollywood Interfaith Sponsoring Committee  
Homies Unidos  
InnerCity Struggle  
Inquilinos Unidos  
Instituto de Educacion Popular del Sur de  
California  
Khmer Girls in Action  
Korean Immigrant Workers Advocates  
Korean Resource Center  
Los Angeles Alliance for a New Economy  
Los Angeles Coalition to End Hunger and  
Homelessness  
Los Angeles Community Action Network  
Los Angeles Metropolitan Churches  
Los Angeles Youth Justice Coalition  
Parents Organized for Westside Renewal  
Pilipino Worker Center of Southern  
California  
Progressive Jewish Alliance  
Restaurant Workers Association of  
Koreatown  
South Asian Network

Southern Californians for Youth  
Strategic Actions for a Just Economy  
Strategic Concepts in Organizing & Policy  
Education (SCOPE)  
Teamsters for a Democratic Union Southern  
California Chapter  
Union de Vecinos

MEET THE COMPOSER

\$6,000

Bach Dancing & Dynamite Society  
Dandelion Dancetheater  
House Foundation for the Arts  
Musical Traditions  
Oakland Asian Cultural Center  
Other Minds  
Society for the Art Publications of the  
Americas

ORANGE COUNTY COMMUNITY  
FOUNDATION

\$100,000

Anaheim Ballet  
Anaheim Museum  
Casa Romantica Cultural Center and  
Gardens  
The Chance Theatre  
Children's Museum of La Habra  
Ektaa Center  
Festival Ballet Theatre  
Huntington Beach Arts Center  
KOCE  
Laguna Art Museum  
Orange County Museum of Art  
Pacific Chorale  
Philharmonic Society of Orange County  
Saint Joseph Ballet  
Stop-Gap

POETS & WRITERS

\$65,000

Amp Press  
Arcade Poetry Project  
Art Foundry Gallery  
Art is Permitted Everywhere  
Beyond Baroque  
Bottled Poetry  
Cal Poly Pomona Liberal Studies  
Calaveras Green Party  
California Lectures  
California Rodeo Salinas  
Casa Romantica  
Center for the Art of Translation  
Central California Writers  
City of Ventura Cultural Affairs Division  
College of the Redwoods  
CSU Chico  
CSU Long Beach  
CSU Sacramento  
Cuesta College  
The dA Center for the Arts  
Dream Institute of Northern California  
Earth Pulse  
Friends of Coast Community Library  
Friends of the Memorial Library  
Friends of the Sunland-Tujunga Branch  
Library  
Fullerton College  
Galeria de la Raza  
Gneiss Poetry Series at Plaza Roberge  
Grossmont College Creative Writing  
Program  
Highways Performance Space  
Homeboy Industries  
Intercultural Community Center  
Kearny Street Workshop  
Kern County Library  
Kings County Library  
Lake County Arts Council  
Lancaster Public Library  
Literature Alive!  
Little Sisters of the Poor, Jeanne Jugan  
Residence

Living Writers Series, SDSU  
Lone Pine Film Festival  
Long Beach Museum of Art  
Los Angeles Poetry Festival  
Luna's Café  
Marin County Free Library - Fairfax Library  
Marin Poetry Center  
Memorial Academy Charter School  
Mendocino Coast Writers Conference  
Mendocino College Library  
Mills College/Place for Writers  
Miramar College Diversity Committee  
Monterey Cowboy Poetry & Music Festival  
Monterey Public Library  
Moorpark College  
Mount Shasta Branch Library  
Mount Shasta Writers Series  
Napa Valley Writers' Conference  
National Park Service  
Nevada County Library  
Nevada County Poetry Series  
New Langton Arts  
Nonconformist Muffin  
North Coast Redwoods Writers' Conference  
NRP Productions  
Oxnard College  
Palm Springs Desert Museum  
Pegasus Gallery  
Petaluma Arts Council  
Petaluma Poetry Walk  
Placencia Library District  
Plumas County Arts Commission  
Poet Laureate Committee of Ukiah  
Poetry Center San Jose  
Poetry Ctr/Amer. Poetry Archives  
Poetry Santa Cruz  
Poetry Unplugged  
Queer Cultural Center  
Red Hen Press  
REDCAT  
Rhythm & Words Poetry Series  
Rhythm and Muse  
Ridgestock  
River Ranch  
Riverside Public Library  
Ruskin Art Club  
Sacramento Poetry Center  
Saint Mary's College  
San Anselmo Library

San Bernardino Public Library  
San Buenaventura Artists' Union  
San Diego Public Library  
San Luis Obispo Poetry Festival  
Santa Monica Public Library  
Santa Rosa Junior College  
Sebastopol Center for the Arts  
SF Center for the Book  
Sierra Valley Grange  
Siskiyou Arts Council



Skyline College  
Small Press Traffic  
Sonoma State University  
South Placer Heritage Foundation  
Southwestern College Reading Series  
Status Unknown  
Sweetie's  
Tebot Bach  
The Fort Preservation Society  
The Gathering  
The HeArt  
The Performance Loft  
The World Stage  
Third Thursday Poets  
Thompson Peak Writers Group

Torrance Public Library  
Tropico de Nopal  
UC Berkeley Lunch Poems  
UC Riverside Dept. of Music  
UC Santa Cruz Creative Writing Program  
University of California, Riverside  
University of San Francisco  
Ventura College  
Ventura County Writers Club  
Vietnamese American Arts & Letters  
Association

Villa Aurora  
Watershed Poetry Festival  
Westhaven Center for the Arts  
Westmont College  
WORDS Performance  
Writers at Work  
Writers Read  
Yorba Linda Public Library  
Zoey's Café

THE SAN DIEGO FOUNDATION  
\$ 67,000

Aja Project  
Eveoke Dance Theatre  
Jean Isaacs' San Diego Dance Theater  
Media Arts Center, San Diego  
Mo'olelo Performing Arts Company  
New Village Arts  
Playwrights Project  
San Diego Asian Film Foundation  
Women's History Museum  
Young Audiences of San Diego

THE SAN FRANCISCO FOUNDATION  
\$ 45,000

American Composers Forum, San Francisco  
Bay Area Chapter  
Artadia  
Theatre Bay Area  
World Arts West

SAN LUIS OBISPO COUNTY  
COMMUNITY FOUNDATION  
\$ 40,000

Adobe Players  
Central Coast Children's Choir  
REC  
San Luis Obispo County Arts Council  
SLO County Youth Symphony  
San Luis Obispo Little Theater  
SLO Symphony  
Vocal Arts Ensemble

THEATRE BAY AREA  
\$ 26,000

Active Arts Theatre for Young Audiences  
African American Drama Company of  
California  
Alternative Theatre Ensemble  
Bindlestiff Studio  
Counterpointe  
Dance Elixir  
Kunst-Stoff  
Ledoh and Salt Farm  
LiquidFIRE Productions  
Lisa Townsend Company  
Loose Change Dance Company  
Maria de la Losa (choreographer)  
Mas Makers Massive  
Mosaic Theatre Group  
Motion  
Oakland Public Theater  
Peony Performing Arts  
Potrzebie Dance Project  
San Francisco Recovery Theatre  
Savage Jazz Dance Company  
Subterranean Shakespeare Theatre Company  
Sun and Moon Ensemble  
SusTandy Beal and Company  
The Foundry  
Theatre Diffusion

WALTER AND ELISE HAAS FUND  
\$ 130,000

African American Art and Culture Complex  
Alliance Francaise  
Berkeley Opera  
California Academy of Sciences  
Chinese Cultural Foundation  
Creativity Explored  
Crowden School  
Cultural Odyssey

Destiny Arts  
Door Dog Music Productions  
KlezCalifornia  
Kronos Quartet  
Philharmonia Baroque  
Rova: Arts  
San Francisco International Arts Festival  
Theater of Yugen  
Thick Description  
Unity Council  
Yerba Buena Arts and Events  
Z Space Studio

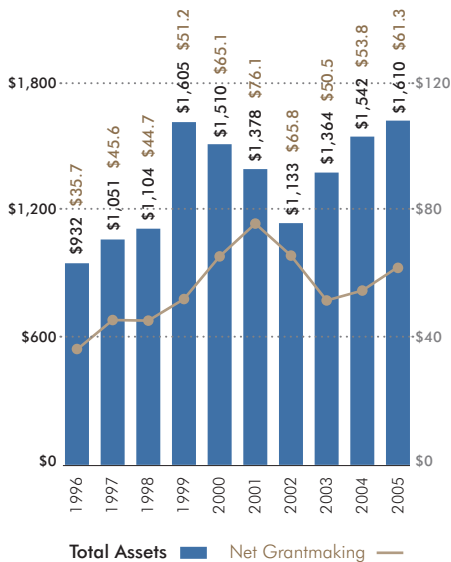
WOMEN'S FOUNDATION OF  
CALIFORNIA  
\$ 50,000

Alianza Indigena  
Bakersfield Performing Arts and  
Philanthropic Society  
Breast Cancer Action  
Center on Policy Initiatives  
Center on Race, Poverty, and the  
Environment  
Homeboy Industries/Homegirl Café  
Los Angeles Indigenous People's Alliance  
Mujeres Unidas y Activas  
Native Women's Health and Wellness  
Alliance  
Orange County Asian Pacific Islander  
Community Association  
Pan Valley Institute  
Project Concern International  
Silicon Valley Toxics Coalition  
Strategic Actions for a Just Economy  
Sutter Lakeside Community Services  
The Cahto Tribe  
Transportation and Land Use Committee  
Tulare Women's Network  
Westside Residents for Clean Air Now  
Women's Health Specialists  
Working Partnerships USA

## FROM THE CHIEF INVESTMENT OFFICER AND TREASURER

During 2005, the Foundation's endowment earned 11.9 percent to end the year at more than \$1.6 billion. This result was due to strong returns from the equity markets, especially the international equity markets, and from private equity investments held by the Foundation. On the grantmaking side, total grants approved in 2005 were \$61.3 million, up 13.9 percent from the previous year. Graph 1 provides a 10-year history of year-end assets and net grantmaking for the Foundation. We are pleased to report that 2005 marked the third consecutive year of recovery for our endowment, an increase in assets that permits us to expand our grantmaking to nonprofit organizations in California by another 13 percent in 2006.

1. TOTAL ASSETS AND NET GRANTMAKING 1996-2005  
(in millions)

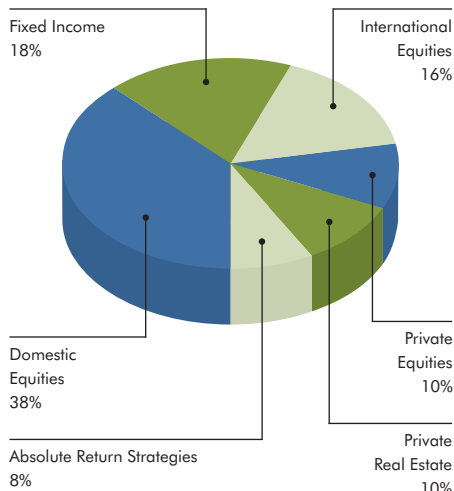


I have used these letters in previous years to open a window into the Foundation's approach to its investment activities. This year, I would like to focus on some changes we began to implement in 2005 consistent with a new approach to asset allocation.

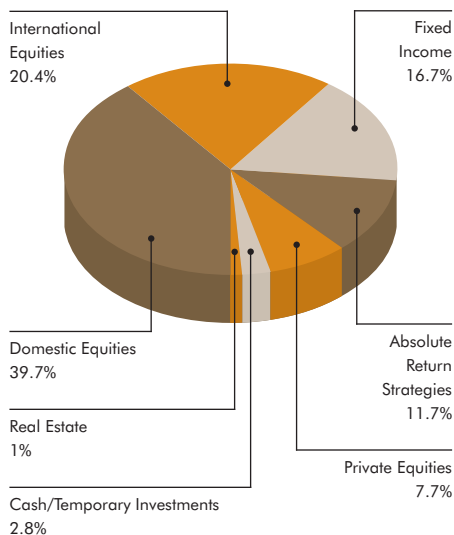
The Foundation maintains a long-term view, with the objective of earning at least 5.5 percent on an annual basis, after inflation and investment fees. Our strategy for achieving this goal is to invest our assets according to a carefully structured allocation model, illustrated in Graph 2, that is designed to reflect the appropriate balance of risk and return over time. The Board of Directors adopted a new asset allocation plan for the Foundation in 2003, and we continued to focus in 2005 on implementing this more diversified portfolio.

Specifically, during the year, we increased our investment activity in private real estate and absolute return strategies, two asset classes introduced in 2004. While the endowment's returns will continue to be driven largely by the global public equity and debt markets, these new asset classes represent meaningful efforts to diversify the endowment's portfolio and produce a more stable earnings stream over time. Compared with our public equity and fixed income portfolios, investing in these new asset classes is far more challenging. Information about investments is much less readily available, and significant staff time

2. STRATEGIC ASSET ALLOCATION



3. INVESTMENT PORTFOLIO AS OF DECEMBER 31, 2005



must be spent to understand each opportunity. Individual commitments are generally much smaller and have very little liquidity. In order to successfully invest in these asset classes, the Foundation has set out to build its expertise, by increasing its investment staff and developing the related accounting, tax, and legal expertise to effectively access these attractive investment opportunities.

Graph 3 shows how our assets were invested as of December 31, 2005.

We continue to review our approach to asset allocation, which will likely result in additional changes in coming years to ensure we meet our return targets.

Although the endowment has performed well these past three years, it is my view that we cannot expect similar returns in the near term. As support for this cautionary note, for the period of January through June 2006, the financial markets were essentially flat, and the Foundation’s endowment produced only a modest 5 percent return. This underscores once again why a diversified portfolio is essential to our long-term investment strategy.

The Foundation’s investment program exists for the sole purpose of maximizing Irvine’s financial resources to support our mission of expanding opportunity for the people of California. These annual updates seek to describe our progress in this regard, to share recent developments in our investment program, and to continue to demonstrate our commitment to transparency in all aspects of the Foundation’s operations.

John R. Jenks, CFA  
 Chief Investment Officer and Treasurer  
 August 2006

# INDEPENDENT AUDITORS' REPORT

We have audited the accompanying statements of financial position of The James Irvine Foundation (the "Foundation") as of December 31, 2005 and 2004, and the related statements of activities and changes in net assets and of cash flows for the years then ended. These financial statements are the responsibility of the Foundation's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Foundation's internal control over financial reporting. Accordingly, we express no such opinion. An audit also includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

In our opinion, such financial statements present fairly, in all material respects, the financial position of the Foundation as of December 31, 2005 and 2004, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

As discussed in Notes 1 and 6, the Foundation changed its method of accounting for federal excise taxes to include a provision for deferred federal excise taxes.

*Deloitte + Touche LLP*

June 5, 2006

# STATEMENTS OF FINANCIAL POSITION

December 31, 2005 and 2004

	2005	2004
<b>ASSETS</b>		
Cash – Interest-bearing deposits	\$ 21,572	\$ 14,551
Receivable from Sales of Securities	1,886,135	1,096,762
Interest and Dividends Receivable	3,670,236	3,558,831
Investments:		
Short-term, fixed-income	54,597,374	35,387,330
Equity securities	945,977,402	943,715,579
Alternative investments	335,381,937	292,569,332
Fixed-income securities	266,868,948	264,227,302
Total investments	1,602,825,661	1,535,899,543
Property and Equipment – Net	1,216,435	1,113,502
Prepaid Excise Taxes and Other	860,281	366,320
<b>Total</b>	<b>\$ 1,610,480,320</b>	<b>\$ 1,542,049,509</b>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities:		
Payable for purchases of securities	\$ 1,771,861	\$ 1,109,148
Accounts payable and other accrued liabilities	5,162,784	2,557,620
Deferred federal excise taxes	4,663,170	–
Grants payable – net	24,953,794	37,889,708
Total liabilities	36,551,609	41,556,476
Net Assets – Unrestricted	1,573,928,711	1,500,493,033
<b>Total</b>	<b>\$ 1,610,480,320</b>	<b>\$ 1,542,049,509</b>

See notes to financial statements.



# STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS

Years ended December 31, 2005 and 2004

	2005	2004
<b>Investment Income:</b>		
Interest	\$ 13,230,921	\$ 13,656,815
Dividends	18,709,422	18,681,944
Operating gain (loss) from alternative investments	485,018	(2,430,569)
Fee income	396,128	214,010
Investment income before net realized and unrealized gains on investments	32,821,489	30,122,200
Net realized and unrealized gains on investments	124,331,553	216,404,531
<b>Total investment income</b>	<b>157,153,042</b>	<b>246,526,731</b>
<b>Investment Expenses</b>	<b>8,260,726</b>	<b>6,201,289</b>
<b>Net Investment Gain Before Federal Excise Taxes</b>	<b>148,892,316</b>	<b>240,325,442</b>
<b>Excise and Income Taxes</b>	<b>2,601,988</b>	<b>2,834,165</b>
<b>Net Investment Income</b>	<b>146,290,328</b>	<b>237,491,277</b>
<b>Expenses:</b>		
Grants approved by the Board of Directors	61,329,247	53,773,804
Conditional grant activity and other – net	(887,074)	(1,235,997)
Grant expense – net	60,442,173	52,537,807
Program administration expenses	6,691,707	5,641,696
<b>Total expenses</b>	<b>67,133,880</b>	<b>58,179,503</b>
<b>Change in Net Assets – Unrestricted before cumulative effect of change in accounting for deferred federal excise taxes</b>	<b>79,156,448</b>	<b>179,311,774</b>
<b>Cumulative effect of change in accounting for deferred federal excise taxes</b>	<b>(5,720,770)</b>	<b>–</b>
<b>Change in Net Assets – Unrestricted</b>	<b>73,435,678</b>	<b>179,311,774</b>
<b>Net Assets – Unrestricted:</b>		
Beginning of year	1,500,493,033	1,321,181,259
End of year	<b>\$ 1,573,928,711</b>	<b>\$ 1,500,493,033</b>

See notes to financial statements.

# STATEMENTS OF CASH FLOWS

Years ended December 31, 2005 and 2004

	2005	2004
<b>Cash Flows from Operating Activities:</b>		
Change in net assets – unrestricted	\$ 73,435,678	\$ 179,311,774
Adjustments to reconcile change in net assets – unrestricted to net cash and cash equivalents used in operating activities:		
Cumulative effect of change in accounting principle for deferred federal excise taxes	5,720,770	–
Depreciation and amortization	346,144	497,990
Property and equipment write-offs	429,851	4,481
Net realized and unrealized gains on investments	(124,331,553)	(216,404,531)
Operating (gain) loss from alternative investments	(458,018)	2,430,569
Changes in operating assets and liabilities:		
Interest and dividends receivable	(111,405)	333,739
Prepaid excise taxes and other	(493,961)	27,833
Accounts payable and other accrued liabilities	2,605,164	505,775
Deferred federal excise taxes	(1,057,600)	–
Grants payable	(12,935,914)	2,534,129
<b>Net cash and cash equivalents used in operating activities</b>	<b>(56,877,844)</b>	<b>(30,758,241)</b>
<b>Cash Flows from Investing Activities:</b>		
Purchases of investments	(777,096,172)	(987,143,809)
Proceeds from sales, maturities, and distributions from investments	854,070,009	1,016,175,394
Purchases of property and equipment	(878,928)	(415,480)
<b>Net cash and cash equivalents provided by investing activities</b>	<b>76,094,909</b>	<b>28,616,105</b>
<b>Increase (Decrease) in Cash and Cash Equivalents</b>	<b>19,217,065</b>	<b>(2,142,136)</b>
<b>Cash and Cash Equivalents – Beginning of year</b>	<b>35,401,881</b>	<b>37,544,017</b>
<b>Cash and Cash Equivalents – End of year</b>	<b>\$ 54,618,946</b>	<b>\$ 35,401,881</b>
<b>Supplemental Disclosure of Cash Flow</b>		
Information – Federal excise taxes paid	\$ 1,764,588	\$ 2,520,000

See notes to financial statements.

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

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## NOTE 1. ORGANIZATION

The James Irvine Foundation (the “Foundation”) is a private foundation dedicated to expanding opportunity for the people of California to participate in a vibrant, successful and inclusive society. The Foundation’s grantmaking is organized around three program areas: Arts, Youth, and California Perspectives, which focuses on increasing public understanding of critical issues facing the state and infusing new ideas into the policy development process.

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## NOTE 2. SIGNIFICANT ACCOUNTING POLICIES

**Basis of Presentation**—The accompanying financial statements are presented on the basis of unrestricted, temporarily restricted, and permanently restricted net assets. At December 31, 2005 and 2004, the Foundation had no temporarily or permanently restricted net assets.

**Cash and Cash Equivalents**—Cash and cash equivalents consist of cash and short-term, fixed-income investments with maturities of three months or less at date of purchase at December 31, 2005 and 2004, are as follows:

	2005	2004
Cash, interest-bearing deposits	\$21,572	\$14,551
Short-term, fixed-income investments	54,597,374	35,387,330
Total	<u>\$54,618,946</u>	<u>\$35,401,881</u>

**Investments**—Investments are stated at quoted market prices or estimated fair values, which are based on independent valuations. Investment expenses include investment management fees, custodial fees, and an allocation of the Foundation’s operating expenses. The Foundation maintains the following categories of investments:

- Short-term, fixed income investments include commercial paper, demand notes, foreign currency and corporate and government bonds. For statement of cash flows presentation purposes, these securities are considered to be cash equivalents as such securities have original maturities of three months or less.
- Equity securities primarily consist of investments in both domestic and foreign corporate common stock securities.
- Alternative investments represent investments in limited partnerships, hedge funds, and other non-public investments.
- Fixed-income securities include holdings in corporate and municipal bonds, as well as U.S. government securities, various mortgage and asset-backed bonds, and convertible corporate debentures.

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

**Property and Equipment**—Property and equipment is stated at cost and depreciated using the straight-line method over estimated useful lives of the assets ranging from 3 to 10 years. Leasehold improvements are amortized over the lesser of the asset's useful life or the lease term.

**Fee Income**—A securities lending program is managed by the Foundation's investment custodian. This program permits the custodian to loan certain of the Foundation's stocks and bonds included in its investment portfolio. The Foundation's investment custodian has indemnified the Foundation against the counterparty risk and the Foundation receives a fee related to securities loaned under the program.

**Grants**—Grants are expensed when the unconditional promise to give is approved by the Board of Directors. Conditional promises to give, consisting primarily of grants with matching requirements, are recognized as grant expense in the period in which the recipient meets the terms of the condition. Such conditions may also include other requirements, such as the requirement for a newly formed organization to successfully establish its 501(c)(3) status before the grant becomes unconditional. Grant refunds are recorded as a reduction of grant expense at the time the Foundation becomes aware the grant will be refunded.

**Functional Expense Allocations**—Expenses, such as salaries and payroll taxes, travel and meeting expense, depreciation and amortization, and rent, are allocated among investment expenses and program administration expenses based on employee ratios and estimates made by the Foundation's management.

**Pension Plan**—The Foundation provides a defined contribution pension plan for all its employees. The plan is funded by the Foundation and maintained by an independent trustee. Contributions to the plan were approximately \$607,000 and \$545,000 in 2005 and 2004, respectively.

**Estimated Fair Value of Financial Instruments**—The carrying amounts of cash, receivable from sales of securities, interest and dividends receivable, accounts payable and other accrued liabilities, and payable for purchases of securities approximate fair value because of the short maturity of these financial instruments. Investments are held at estimated fair value. The alternative investments represent investments in limited partnerships, hedge funds, and other non-public investments, which include nonmarketable and restricted investment securities whose values have been estimated by the general partner of the limited partnership or the managing member of the corporation in the absence of readily ascertainable market values. Because of the inherent uncertainty of valuation of nonmarketable and restricted investments, those estimated values may differ significantly from the values that would have been used

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

had a ready market for the securities existed, and the differences could be material.

The carrying amount of grants payable approximates fair value because such liabilities are recorded at estimated net present value based on anticipated future cash flows.

**Concentrations of Credit Risk**— Financial instruments, which potentially subject the Foundation to credit risk, consist primarily of cash, cash equivalents, and investments. The Foundation maintains cash and cash equivalents with major financial institutions. At times, such amounts may exceed Federal Deposit Insurance Corporation limits. The Foundation’s investments have been placed with high-quality counter parties. The Foundation closely monitors these investments and has not experienced significant credit losses.

**Tax Exempt Status**— The Foundation is a private foundation and is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code (the “Code”) and from California franchise and/or income taxes under Section 23701(d) of the Revenue and Taxation Code.

**Use of Estimates**— The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions. These estimates and assumptions affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Significant accounting estimates reflected in the Foundation’s financial statements include the determination of the fair value of investments (including alternative investments), the discount on grants payable, the calculation of federal excise taxes expense, and the functional expense allocation. Actual results could differ from those estimates.

**Change in Accounting Policy**— The Foundation changed its method of accounting for federal excise taxes to include a provision for deferred federal excise taxes. This method was adopted to recognize a preferable method of accounting for federal excise taxes (See Note 6).

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## NOTE 3. INVESTMENTS

Investments are stated at quoted market prices or estimated fair values, which are based on independent valuations. The net realized and unrealized gains on investments for the years ended December 31, 2005 and 2004, are comprised as follows:

	2005	2004
Net realized gains on investments sold	\$176,442,454	\$118,639,752
Net unrealized (losses) gains on investments	(52,110,901)	97,764,779
Net realized and unrealized gains on investments	<u>\$124,331,553</u>	<u>\$216,404,531</u>

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

The Foundation made capital contributions totaling \$100,748,108 and \$108,933,195 in 2005 and 2004, respectively, to alternative investments as called for by the investment agreements. As of December 31, 2005, the Foundation has commitments under various investment agreements to make additional capital contributions of \$270,702,697.

## NOTE 4. PROPERTY AND EQUIPMENT

Property and equipment as of December 31, 2005 and 2004, consists of:

	2005	2004
Office furniture and equipment	\$1,143,595	\$2,190,847
Leasehold improvements	862,931	2,399,324
Construction in progress	–	338,741
Total	2,006,526	4,928,912
Accumulated depreciation and amortization	(790,091)	(3,815,410)
Property and equipment—net	\$1,216,435	\$1,113,502

## NOTE 5. GRANTS

The following table summarizes for the years ended December 31, 2005 and 2004, the Foundation's grant activity:

	2005	2004
Grants approved by the Board of Directors	\$61,329,247	\$53,773,804
Add (deduct):		
Conditional grants made	(1,416,500)	(1,441,664)
Conditions met on conditional grants made in prior years	175,000	98,500
Recision of conditional grants	100,000	50,000
Change in discounts on multi-year grants—net	9,590	(184,913)
Matching gifts program	244,836	242,385
Grants refunded	–	(305)
Conditional grant activity and other—net	(887,074)	(1,235,997)
Grant expense—net	\$60,442,173	\$52,537,807

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

Future minimum grant disbursements as of December 31, 2005, are scheduled as follows:

	Unconditional	Conditional
2006	\$19,998,582	\$50,000
2007	5,156,750	2,533,164
2008	129,000	—
Total	25,284,332	2,583,164
Less discounts on multi-year grants	(330,538)	—
Grants payable—net	<u>\$24,953,794</u>	<u>\$2,583,164</u>

## NOTE 6. EXCISE AND INCOME TAXES

In accordance with the applicable provisions of the Code, the Foundation is subject to an excise tax of 2% (1% if minimum payout requirements prescribed by the Code are met) on its net investment income, excluding unrealized gains, as defined, and is subject to corporate tax rates on unrelated business income. The Foundation was subject to the 1% rate in 2005 and 2% rate in 2004. In addition, the Code requires that certain minimum distributions be made in accordance with a specified formula. At December 31, 2005 and 2004, the Foundation had made the required minimum distributions.

Deferred excise taxes arise primarily from unrealized gains on investments. At December 31, 2005, deferred federal excise tax is estimated at 2%, which is the maximum rate payable.

The (benefit) provision for current and deferred federal excise tax as of December 31, 2005 and 2004, is as follows:

	2005	2004
Current	<b>\$3,659,588</b>	\$2,834,165
Deferred	<b>(1,057,600)</b>	—
Excise and income tax expense	<u><b>\$2,601,988</b></u>	<u>\$2,834,165</u>

As of January 1, 2005, the Foundation changed its method of accounting for federal excise taxes to include a provision for deferred federal excise taxes. This method was adopted as a more conservative presentation of the Foundation's available resources. The cumulative effect

# NOTES TO FINANCIAL STATEMENTS

Years ended December 31, 2005 and 2004

of the change in accounting is a decrease in net assets of \$5,720,770 as of January 1, 2005. Had the Foundation adopted this method effective January 1, 2004, the Foundation would have recognized a deferred tax liability of \$3,765,474 at that date and the deferred tax expense would have been \$1,955,296 for the year ended December 31, 2004. Accordingly, the net assets as of December 31, 2004, would have been \$1,494,772,263.

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## NOTE 7. LEASE COMMITMENTS

The Foundation leases its facilities under long-term noncancelable operating leases. Approximate future minimum lease payments, subject to adjustments based on changes in real property taxes and maintenance expenses, are as follows as of December 31, 2005:

Year Ending December 31	Total
2006	\$408,825
2007	408,825
2008	408,825
2009	387,845
2010	358,473
Thereafter	1,553,381
Total	<u>\$3,526,174</u>

Rental expense was approximately \$910,000 and \$839,000 in 2005 and 2004, respectively.



# BOARD OF DIRECTORS

August 2006

## Officers

Gary B. Pruitt  
*Chair*

Patricia S. Pineda  
*Vice Chair*

James E. Canales  
*President and Chief Executive Officer*

John R. Jenks  
*Chief Investment Officer, Treasurer,  
and Corporate Secretary*

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*Palo Alto*

James E. Canales  
*San Francisco*

Jane W. Carney  
*Riverside*

Frank H. Cruz  
*Laguna Niguel*

David Mas Masumoto  
*Del Rey*

Regina Liang Muehlhauser  
*Pleasanton*

Molly Munger  
*Los Angeles*

Patricia S. Pineda  
*Lafayette*

Gary B. Pruitt  
*Sacramento*

Toby Rosenblatt  
*San Francisco*

Steven A. Schroeder  
*San Francisco*

Peter J. Taylor  
*Los Angeles*

# STAFF

August 2006

## Executive Office

James E. Canales  
*President and Chief Executive Officer*

Kristin Nelson  
*Executive Assistant*

## Program

Martha S. Campbell  
*Vice President for Programs*

Marcelle Hinand Cady  
*Program Director, Arts*

Amy Dominguez-Arms  
*Program Director, California Perspectives*

Anne B. Stanton  
*Program Director, Youth*

Rogéair Purnell  
*Senior Program Officer, Youth*

Jorge Ruiz de Velasco  
*Senior Program Officer, Youth*

Ted Russell  
*Senior Program Officer, Arts*

Latonya Slack  
*Senior Program Officer, California Perspectives  
(Los Angeles)*

Jeanne Sakamoto  
*Program Officer, Arts (Los Angeles)*

Anne K. Vally  
*Special Initiatives Officer*

Sarah Ihn  
*Program Associate, California Perspectives*

Emily Sevier  
*Program Associate, Arts*

Kenji Treanor  
*Program Associate, Youth*

Drusilla Jones  
*Administrative Assistant*

## Communications

Daniel Silverman  
*Director of Communications*

Alex Barnum  
*Communications Officer*

Dana Brownfield  
*Communications Associate*

## Finance and Administration

John R. Jenks  
*Chief Investment Officer, Treasurer,  
and Corporate Secretary*

Jeff Kumataka  
*Director of Finance and Administration*

## Accounting

Colette Clark  
*Controller*

Lavinia Tiu-Mondala  
*Staff Accountant*

Ferdie Sarmiento  
*Staff Accountant*

## Grants Administration

Kelly Martin  
*Grants Manager*

Tiauna George  
*Grants Assistant*

## Information Technology

Jeff Brandenburg  
*Manager of Information Technology*

Gerald Spica  
*Information Technology / Web Administrator*

## Investments

Seck-Eng Tan  
*Director of Investments*

Anne Matlock  
*Manager of Investments*

## Operations

Ann K. Gomes  
*Operations Manager*

Betty Bui  
*Human Resources Manager*

Micky Shirley  
*Administrative Assistant*

Angie Aguilar  
*Receptionist & Administrative Assistant*

Evan Carlson  
*Office Manager & Administrative Assistant  
(Los Angeles)*

the **James Irvine** foundation  
*Expanding Opportunity for the People of California*

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SAN FRANCISCO, CALIFORNIA 94105  
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865 SOUTH FIGUEROA, SUITE 2308  
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