

PUBLIC DISCLOSURE COPY

PLEASE FILE IN A SAFE PLACE

ARMANINO ADVISORY LLC

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.**2024**

Open to Public Inspection

For calendar year 2024 or tax year beginning , and ending

Name of foundation CALIFORNIA PHYSICIANS' SERVICE FDN DBA BLUE SHIELD OF CALIFORNIA FDN		A Employer identification number 94-2822302
Number and street (or P.O. box number if mail is not delivered to street address) 315 MONTGOMERY STREET, SUITE 1200	Room/suite	B Telephone number (415) 229-6080
City or town, state or province, country, and ZIP or foreign postal code SAN FRANCISCO, CA 94104		C If exemption application is pending, check here ... ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ... ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 80,742,263.	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d), must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	20,126,479.		N/A	
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,397,391.	2,397,391.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,680,145.			STATEMENT 1
	b Gross sales price for all assets on line 6a 44,424,101.				
	7 Capital gain net income (from Part IV, line 2)		14,843,160.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold ...					
c Gross profit or (loss)					
11 Other income	6,842.	0.		STATEMENT 3	
12 Total. Add lines 1 through 11	24,210,857.	17,240,551.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	75,000.	0.		75,000.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	63,000.	0.		63,000.
	c Other professional fees STMT 5	4,209,815.	9,784.		4,200,031.
	17 Interest				
	18 Taxes STMT 6	252,125.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	182,361.	0.		182,361.
	22 Printing and publications				
	23 Other expenses STMT 7	931,156.	0.		1,359,214.
	24 Total operating and administrative expenses. Add lines 13 through 23	5,713,457.	9,784.		5,879,606.
	25 Contributions, gifts, grants paid	17,071,045.			16,626,371.
26 Total expenses and disbursements. Add lines 24 and 25	22,784,502.	9,784.		22,505,977.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements ...	1,426,355.				
b Net investment income (if negative, enter -0-)		17,230,767.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only.		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		180,190.	277,295.	277,295.
	2	Savings and temporary cash investments		6,385,852.	4,229,696.	4,229,696.
	3	Accounts receivable 1,598.				
		Less: allowance for doubtful accounts		5,536.	1,598.	1,598.
	4	Pledges receivable				
		Less: allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable				
		Less: allowance for doubtful accounts				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		108,793.	181,046.	181,046.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 10		26,530,523.	25,644,877.	25,644,877.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment: basis				
	Less: accumulated depreciation					
12	Investments - mortgage loans					
13	Investments - other STMT 11		43,990,537.	50,204,433.	50,204,433.	
14	Land, buildings, and equipment: basis					
	Less: accumulated depreciation					
15	Other assets (describe STATEMENT 12)		149,740.	203,318.	203,318.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		77,351,171.	80,742,263.	80,742,263.	
Liabilities	17	Accounts payable and accrued expenses		900,741.	544,937.	
	18	Grants payable		279,900.	724,574.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe EXCISE TAX PAYABLE)		53,901.	79,618.	
23	Total liabilities (add lines 17 through 22)		1,234,542.	1,349,129.		
Net Assets or Fund Balances		Foundations that follow FASB ASC 958, check here ☒ and complete lines 24, 25, 29, and 30.				
	24	Net assets without donor restrictions		76,116,629.	79,393,134.	
	25	Net assets with donor restrictions				
		Foundations that do not follow FASB ASC 958, check here ☐ and complete lines 26 through 30.				
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds ...				
	29	Total net assets or fund balances		76,116,629.	79,393,134.	
30	Total liabilities and net assets/fund balances		77,351,171.	80,742,263.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	76,116,629.
2	Enter amount from Part I, line 27a	2	1,426,355.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 8	3	9,963,464.
4	Add lines 1, 2, and 3	4	87,506,448.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 9	5	8,113,314.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	79,393,134.

Form 990-PF (2024)

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 25,401,063.		22,778,477.	2,622,586.
b 19,023,038.		6,802,464.	12,220,574.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			2,622,586.
b			12,220,574.
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	14,843,160.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8	3	N/A

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)		1	239,508.
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.	
3 Add lines 1 and 2	3	239,508.	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	239,508.	
6 Credits/Payments:			
a 2024 estimated tax payments and 2023 overpayment credited to 2024	6a	272,249.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	272,249.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	32,741.	
11 Enter the amount of line 10 to be: Credited to 2025 estimated tax 32,741. Refunded	11	0.	

Form 990-PF (2024)

Part VI-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year? N/A		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. CA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the tax year beginning in 2024? See the instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>WWW.BLUESHIELDCAFOUNDATION.ORG</u>	X	
14 The books are in care of <u>DEBORAH CHANG, CEO</u> Telephone no. <u>(415) 229-6080</u> Located at <u>315 MONTGOMERY STREET, SUITE 1200, SAN FRANCISCO, CA</u> ZIP+4 <u>94104</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15 N/A		
16 At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

Form **990-PF** (2024)

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

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

1a During the year, did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person?

1a(1) Yes No X

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?

1a(2) Yes No X

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?

1a(3) Yes No X

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?

1a(4) Yes X No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?

1a(5) Yes No X

(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)

1a(6) Yes No X

b If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions

1b Yes No X

c Organizations relying on a current notice regarding disaster assistance, check here ☐**d** Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?

1d Yes No X

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):**a** At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?

2a Yes No X

If "Yes," list the years _____, _____, _____, _____

b Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)

N/A

2b Yes No

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. _____, _____, _____, _____**3a** Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

3a Yes No X

b If "Yes," did it have excess business holdings in 2024 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2024.)

N/A

3b Yes No

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

4a Yes No X

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2024?

4b Yes No X

Form **990-PF** (2024)

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

	Yes	No
5a(1)		X

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

5a(2)		X
-------	--	---

(3) Provide a grant to an individual for travel, study, or other similar purposes?

5a(3)		X
-------	--	---

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

5a(4)	X	
-------	---	--

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

5a(5)		X
-------	--	---

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

5b		X
----	--	---

c Organizations relying on a current notice regarding disaster assistance, check here ☐**d** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **SEE STATEMENT 14**

5d	X	
----	---	--

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

6a		X
----	--	---

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b		X
----	--	---

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

7a		X
----	--	---

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

7b		
----	--	--

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

8		X
---	--	---

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		75,000.	0.	8,956.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

Form 990-PF (2024)

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
DAYLIGHT DESIGN LLC - 375 ALABAMA STREET, SUITE 380, SAN FRANCISCO, CA 94110	CONSULTING SERVICES	378,500.
PERRY UNDEM LLC 4800 HAMPDEN LANE, BETHESDA, MD 20814	CONSULTING SERVICES	360,000.
IMPACT JUSTICE - 2930 LAKESHORE AVENUE, SUITE 300, OAKLAND, CA 94610	CONSULTING SERVICES	346,020.
BRIGHT RESEARCH GROUP 1211 PRESERVATION PARK WAY, OAKLAND, CA 94612	CONSULTING SERVICES	205,500.
NVG LLC - 1640 RHODE ISLAND AVENUE NORTHWEST SUITE 700, WASHINGTON, DC	CONSULTING SERVICES	198,000.
Total number of others receiving over \$50,000 for professional services		28

Part VIII-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SEE STATEMENT 15	378,500.
2 SEE STATEMENT 16	360,000.
3 SEE STATEMENT 17	346,020.
4 SEE STATEMENT 18	127,500.

Part VIII-B Summary of Program-Related Investments

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

Form 990-PF (2024)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	66,577,489.
b	Average of monthly cash balances	1b	5,608,582.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	72,186,071.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	72,186,071.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	1,082,791.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	71,103,280.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	3,555,164.

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

1	Minimum investment return from Part IX, line 6	1	3,555,164.
2a	Tax on investment income for 2024 from Part V, line 5	2a	239,508.
b	Income tax for 2024. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	239,508.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,315,656.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,315,656.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	3,315,656.

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	22,505,977.
b	Program-related investments - total from Part VIII-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	22,505,977.

Form **990-PF** (2024)

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				3,315,656.
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2024:				
a From 2019 28,366,145.				
b From 2020 42,109,142.				
c From 2021 30,056,576.				
d From 2022 43,990,317.				
e From 2023 20,668,081.				
f Total of lines 3a through e	165,190,261.			
4 Qualifying distributions for 2024 from Part XI, line 4: \$ 22,505,977.				
a Applied to 2023, but not more than line 2a ...			0.	
b Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2024 distributable amount				3,315,656.
e Remaining amount distributed out of corpus	19,190,321.			
5 Excess distributions carryover applied to 2024 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	184,380,582.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7	28,366,145.			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	156,014,437.			
10 Analysis of line 9:				
a Excess from 2020 ... 42,109,142.				
b Excess from 2021 ... 30,056,576.				
c Excess from 2022 ... 43,990,317.				
d Excess from 2023 ... 20,668,081.				
e Excess from 2024 ... 19,190,321.				

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, enter the date of the ruling

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

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed

Tax year	Prior 3 years			(e) Total
	(a) 2024	(b) 2023	(c) 2022	(d) 2021
b 85% (0.85) of line 2a				
c Qualifying distributions from Part XI, line 4, for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon:				
a "Assets" alternative test - enter:				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed				
c "Support" alternative test - enter:				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

Part XIV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

SEE STATEMENT 19

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

c Any submission deadlines:

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

Part XIV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
a Paid during the year				
AAPI WOMEN LEAD 1901 HARRISON ST STE 1100 OAKLAND, CA 94612 - 3648	N/A	PC	GENERAL OPERATING SUPPORT	30,000.
ALLIANCE FOR COMMUNITY TRANSFORMATIONS P.O. BOX 2075 MARIPOSA, CA 95338	N/A	PC	SGP: BUILDING CAPACITY TO SUPPORT CALIFORNIA HONG ADVOCATES NETWORK - BUILDING OUR FUTURE	30,000.
ANTI POLICE-TERROR PROJECT, INC 893 WILLOW STREET OAKLAND, CA 94607	N/A	PC	EMERGING LEADERS	12,341.
ASIAN PACIFIC FUND 345 CALIFORNIA STREET, SUITE 700 SAN FRANCISCO, CA 94104	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
ASIAN PACIFIC INSTITUTE ON GENDER-BASED VIOLENCE 500 12TH STREET, SUITE 330 OAKLAND, CA 94607	N/A	PC	THE ALLIANCE FOR IMMIGRANT SURVIVORS	275,000.
Total SEE CONTINUATION SHEET(S)				3a 16,626,371.
b Approved for future payment				
BLACK CALIFORNIANS UNITED FOR EARLY CARE AND EDUCATION 374 CAMELBACK ROAD PLEASANT HILL, CA 94523	N/A	PC	EMERGING LEADERS	19,024.
CENTER FOR THE PACIFIC ASIAN FAMILY INC. 3424 WILSHIRE BOULEVARD LOS ANGELES, CA 90010	N/A	PC	EMERGING LEADERS	21,000.
CULTIVA LA SALUD 2409 MERCED STREET FRESNO, CA 93721	N/A	PC	COMMUNITY VOICES PROJECT: BRIDGING COMMUNITY AND MEDIA TO CHANGE NARRATIVES FOR POLICY AND SYSTEMS	100,000.
Total SEE CONTINUATION SHEET(S)				3b 724,574.

Form **990-PF** (2024)

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ASIAN RESOURCES, INC. 6270 ELDER CREEK ROAD SACRAMENTO, CA 95824	N/A	PC	ADDRESSING HEALTH DISPARITIES THROUGH IMPROVING AANHPI DATA COLLECTION AND REPORTING PRACTICES	225,000.
BLACK EMOTIONAL AND MENTAL HEALTH COLLECTIVE P.O BOX #702 CULVER CITY, CA 90232	N/A	PC	EVALUATING STRENGTHS-BASED MULTIGENERATIONAL MODELS THAT PREVENT DOMESTIC VIOLENCE	400,000.
CALIFORNIA PAN-ETHNIC HEALTH NETWORK 2991 SACRAMENTO ST #298 BERKELEY, CA 94702	N/A	PC	GENERAL OPERATING SUPPORT	175,000.
CALIFORNIA PARTNERSHIP TO END DOMESTIC VIOLENCE PO BOX 151 SACRAMENTO, CA 95812-0151	N/A	PC	SGP: GENERAL OPERATING SUPPORT	30,000.
CALMATTERS 1017 L STREET #261 SACRAMENTO, CA 95814	N/A	PC	DOMESTIC VIOLENCE PREVENTION JOURNALISM BY AND FOR COMMUNITY	100,000.
CALMATTERS 1017 L STREET #261 SACRAMENTO, CA 95814	N/A	PC	SGP: ALIANZA METROPOLITAN NEWS	50,000.
CATALYST CALIFORNIA P.O. BOX 39347 LOS ANGELES, CA 90039	N/A	PC	THE BUDGET POWER PROJECT	300,000.
CATALYST OF SAN DIEGO & IMPERIAL COUNTIES 5060 SHOREHAM PLACE ROOM 350 SAN DIEGO, CA 92122-5903	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
CENTER FOR COMMUNITY CHANGE 1536 U STREET NW WASHINGTON, DC 20009	N/A	PC	PROMOTING ECONOMIC EQUITY THROUGH NARRATIVE CHANGE	200,000.
CENTER FOR EFFECTIVE PHILANTHROPY, INC. 675 MASSACHUSETTS AVE 7TH FLOOR CAMBRIDGE, MA 02139-3309	N/A	PC	GENERAL OPERATING SUPPORT	50,000.
Total from continuation sheets				16,179,030.

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CENTER FOR INDEPENDENT DOCUMENTARY PO BOX 95216 NEWTON, MA 02495	N/A	PC	MAKE A CIRCLE DOCUMENTARY IMPACT CAMPAIGN	50,000.
CENTER FOR YOUNG WOMEN'S DEVELOPMENT (YOUNG WOMEN'S FREEDOM CENTER) 832 FOLSOM STREET, SUITE 700 SAN FRANCISCO, CA 94107	N/A	PC	EVALUATING STRENGTHS-BASED MULTIGENERATIONAL MODELS THAT PREVENT DOMESTIC VIOLENCE	400,000.
CENTER FOR YOUNG WOMEN'S DEVELOPMENT (YOUNG WOMEN'S FREEDOM CENTER) 832 FOLSOM STREET, SUITE 700 SAN FRANCISCO, CA 94107	N/A	PC	SGP: GENERAL OPERATING SUPPORT	37,000.
CENTRAL VALLEY COMMUNITY FOUNDATION 1260 FULTON ST FRESNO, CA 93721	N/A	PC	SUMMIT ON HEALTH AND SAFETY	50,000.
CERES COMMUNITY PROJECT 1003 GRAVENSTEIN HWY N SEBASTOPOL, CA 95472	N/A	PC	CBO CALAIM ADVOCACY CONVENING	10,000.
CHANGELAB SOLUTIONS 2201 BROADWAY STE 701 OAKLAND, CA 94612	N/A	PC	SUPPORTING PUBLIC HEALTH DEPARTMENTS TO OPERATIONALIZE HEALTH EQUITY	200,000.
COMMON CAUSE EDUCATION FUND 430 S. GARFIELD AVE ALHAMBRA, CA 91801	N/A	PC	SGP: GENERAL OPERATING SUPPORT	50,000.
COMMUNITY FORWARD SF INC 1171 MISSION ST SAN FRANCISCO, CA 94103	N/A	PC	ADVANCING A HOUSING COALITION IN SAN FRANCISCO	200,000.
COMMUNITY INITIATIVES 1000 BROADWAY, SUITE #480 OAKLAND, CA 94607	N/A	PC	ADVANCING EQUITABLE DATA AND EVALUATION PRACTICES THROUGH THE REALIZE POWER LEADERSHIP PROGRAM	100,000.
COMMUNITY PARTNERS 1000 N. ALAMEDA STREET; SUITE 240 LOS ANGELES, CA 90012-1804	N/A	PC	EMERGING LEADERS	40,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CONTRA COSTA FAMILY JUSTICE CENTER ALLIANCE 256 24TH STREET RICHMOND, CA 94804	N/A	PC	SGP: CAPACITY BUILDING SUPPORT TO THE ALLIANCE'S DOMESTIC VIOLENCE PREVENTION MULTISECTOR	30,000.
CONTRA COSTA FAMILY JUSTICE CENTER ALLIANCE 256 24TH STREET RICHMOND, CA 94804	N/A	PC	THE COLLECTIVE HEALING AND TRANSFORMATION PROJECT	500,000.
DOWNTOWN WOMEN'S CENTER 442 SOUTH SAN PEDRO STREET LOS ANGELES, CA 90013	N/A	PC	CREATING HOUSING STABILITY FOR DOMESTIC VIOLENCE SURVIVORS IN LOS ANGELES	450,000.
ECONOMIC SECURITY PROJECT INC. 228 PARK AVE S, PMB 32482 NEW YORK, NY 10003-1502	N/A	PC	CALIFORNIA GUARANTEED INCOME NOW CONFERENCE	25,000.
ECONOMIC SECURITY PROJECT INC. 228 PARK AVE S, PMB 32482 NEW YORK, NY 10003-1502	N/A	PC	SGP: GENERAL OPERATING SUPPORT	35,000.
EQUAL RIGHTS ADVOCATES 611 MISSION STREET, 4TH FLOOR SAN FRANCISCO, CA 94105	N/A	PC	SUPPORTING STRONGER CALIFORNIA'S ECONOMIC SECURITY POLICY AND ADVOCACY AGENDA	150,000.
FAMILY VALUES AT WORK A MULTI-STATE CONSORTIUM INC. PO BOX 48 OAK CREEK, WI 53154	N/A	PC	GENERAL OPERATING SUPPORT TO THE CALIFORNIA WORK & FAMILY COALITION	525,000.
FAMILY VIOLENCE LAW CENTER 470 27TH STREET OAKLAND, CA 94612	N/A	PC	ADVANCING A HOMELESSNESS AND DOMESTIC VIOLENCE COALITION IN ALAMEDA COUNTY	65,000.
FREEFROM 12405 VENICE BLVD #422 LOS ANGELES, CA 90066	N/A	PC	SURVIVORMADE FILM OAKLAND PREMIERE	25,000.
GEORGE WASHINGTON UNIVERSITY 1922 F ST, NW, 4TH FLOOR WASHINGTON, DC 20052-0042	N/A	PC	THE FUNDERS FORUM ON ACCOUNTABLE HEALTH: SCALING COMMUNITY-DRIVEN HEALTH EQUITY	150,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GRANTMAKERS CONCERNED WITH IMMIGRANTS AND REFUGEES PO BOX 2178 PETALUMA, CA 94953	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS 1310 L STREET NW SUITE 650 WASHINGTON, DC 20005	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
GRANTMAKERS IN HEALTH 1100 CONNECTICUT AVENUE, NW, SUITE 1100 WASHINGTON, DC 20036	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
HEALTH LEVEL SEVEN INTERNATIONAL 455 E. EISENHOWER PKWY STE 300 # 025 ANN ARBOR, MI 48108	N/A	NC	THE GRAVITY PROJECT	50,000.
HISPANICS IN PHILANTHROPY 414 13TH ST #200 OAKLAND, CA 94612-2603	N/A	PC	GENERAL OPERATING SUPPORT FOR CHANGE PHILANTHROPY	50,000.
HOMEBOY INDUSTRIES 130 W BRUNO ST LOS ANGELES, CA 90012-1815	N/A	PC	ADVANCING RESTORATIVE PRACTICES TO PREVENT DOMESTIC VIOLENCE	200,000.
HUMAN IMPACT PARTNERS P.O. BOX 3268 OAKLAND, CA 94609	N/A	PC	GENERAL OPERATING SUPPORT	200,000.
INDEPENDENT ARTS & MEDIA P.O. BOX 420442 SAN FRANCISCO, CA 94142	N/A	PC	COMMUNITY-DRIVEN REPORTING ON HEALTH EQUITY ISSUES	100,000.
INTERNATIONAL RESCUE COMMITTEE 5348 UNIVERSITY AVENUE SUITE 205 SAN DIEGO, CA 92105	N/A	PC	SGP: THE FAMILY CHILD CARE SUCCESS PROGRAM	33,000.
JENESSE CENTER, INC. P.O. BOX 8476 LOS ANGELES, CA 90008	N/A	PC	LEADERSHIP COUNCIL FOR DOMESTIC VIOLENCE AND HEALTH CARE OF LOS ANGELES	500,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
LATINO COMMUNITY FOUNDATION 235 MONTGOMERY STREET, SUITE 1160 SAN FRANCISCO, CA 94104	N/A	PC	STRENGTHENING CIVIC ENGAGEMENT OF COMMUNITIES	100,000.
LATINO COMMUNITY FOUNDATION 235 MONTGOMERY STREET, SUITE 1160 SAN FRANCISCO, CA 94104	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
MANATT 2049 CENTURY PARK EAST SUITE 1700 LOS ANGELES, CA 90067	N/A	NC	ADDRESSING HEALTH-RELATED SOCIAL NEEDS THROUGH MEDICAID POLICY	50,000.
MUJERES UNIDAS Y ACTIVAS 3543 18TH ST, #23 SAN FRANCISCO, CA 94110-1684	N/A	PC	EVALUATING STRENGTHS-BASED MULTIGENERATIONAL MODELS THAT PREVENT DOMESTIC VIOLENCE	400,000.
MUJERES UNIDAS Y ACTIVAS 3543 18TH ST, #23 SAN FRANCISCO, CA 94110-1684	N/A	PC	SUPPORTING THE CALIFORNIA DOMESTIC WORKERS COALITION	1,000,000.
NATIONAL ACADEMY OF SCIENCES 500 FIFTH STREET, NW WASHINGTON, DC 20001	N/A	PC	GENERAL OPERATING SUPPORT	150,000.
NEW VENTURE FUND 1828 L STREET, NW, SUITE 300-A WASHINGTON, DC 20036	N/A	PC	REDUCING GUN-RELATED DOMESTIC VIOLENCE IN CALIFORNIA	100,000.
NORTHERN CALIFORNIA GRANTMAKERS 160 SPEAR STREET, SUITE 360 SAN FRANCISCO, CA 94105	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
OPED PROJECT PUBLIC KNOWLEDGE FUND INC 906 AMSTERDAM AVE. NEW YORK, NY 10025	N/A	PC	PUBLIC VOICES FELLOWSHIP FOR DOMESTIC VIOLENCE PREVENTION	170,000.
PALM SPRINGS AIR MUSEUM 745 NORTH GENE AUTRY TRAIL PALM SPRINGS, CA 92262	N/A	PC	GENERAL OPERATING SUPPORT FOR CA STORM RELIEF	25,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PICO CALIFORNIA 2143 EAST CESAR E CHAVEZ AVE LOS ANGELES, CA 90033	N/A	PC	GENERAL OPERATING SUPPORT	200,000.
PICO CALIFORNIA 2143 EAST CESAR E CHAVEZ AVE LOS ANGELES, CA 90033	N/A	PC	STRENGTHENING CIVIC ENGAGEMENT OF COMMUNITIES	100,000.
PICO CALIFORNIA 2143 EAST CESAR E CHAVEZ AVE LOS ANGELES, CA 90033	N/A	PC	SGP: BUILDING ORGANIZATIONAL CAPACITY TO SUSTAIN COMMUNITY ORGANIZING AND ADVOCACY.	25,000.
PILIPINO WORKERS CENTER OF SOUTHERN CALIFORNIA 153 GLENDALE BLVD, 1ST FLOOR LOS ANGELES, CA 90026	N/A	PC	HEMOCARE COOPERATIVE INITIATIVE	175,000.
PREVENTION INSTITUTE 221 OAK STREET OAKLAND, CA 94607	N/A	PC	SAFETY AND HEALING IN NETWORKS OF EQUITY (SHINE): A COHORT OF MULTISECTOR COLLABORATIVES FOR	1,500,000.
PREVENTION INSTITUTE 221 OAK STREET OAKLAND, CA 94607	N/A	PC	GENERAL OPERATING SUPPORT	225,000.
PUBLIC HEALTH FOUNDATION ENTERPRISES, INC. 13300 CROSSROADS PARKWAY NORTH, SUITE 450 CITY OF INDUSTRY, CA 91746	N/A	PC	SGP: CALIFORNIA ABUNDANT BIRTH PROJECT	50,000.
PUBLIC HEALTH FOUNDATION ENTERPRISES, INC. 13300 CROSSROADS PARKWAY NORTH, SUITE 450 CITY OF INDUSTRY, CA 91746	N/A	PC	EMERGING LEADERS	10,810.
PUBLIC POLICY INSTITUTE OF CALIFORNIA 500 WASHINGTON ST STE 600 SAN FRANCISCO, CA 94111-2932	N/A	PC	GENERAL OPERATING SUPPORT	200,000.
RAINBOW SERVICES, LTD. 453 W. 7TH ST. SAN PEDRO, CA 90731	N/A	PC	SUPPORTING DOMESTIC VIOLENCE HOUSING ADVOCACY AND SERVICES IN LOS ANGELES COUNTY	50,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
REGENTS OF THE UNIVERSITY OF CALIFORNIA AT SAN DIEGO 9500 GILMAN, MC0615 SAN DIEGO, CA 92093	N/A	PC	EMERGING LEADERS	29,900.
SCHOLARSHIP AMERICA, INC. ONE SCHOLARSHIP WAY SAINT PETER, MN 56082	N/A	PC	SCHOLARSHIP AMERICA PROGRAM 2024-25	48,000.
SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT 1321 GARDEN HWY SACRAMENTO, CA 95833-9754	N/A	PC	SGP: HEALING TOGETHER CAMPAIGN	50,000.
SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT 1321 GARDEN HWY SACRAMENTO, CA 95833-9754	N/A	PC	EMERGING LEADERS	26,320.
SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT 1321 GARDEN HWY SACRAMENTO, CA 95833-9754	N/A	PC	THE SAN JOAQUIN VALLEY HEALTH FUND	375,000.
SIERRA HEALTH FOUNDATION CENTER FOR HEALTH PROGRAM MANAGEMENT 1321 GARDEN HWY SACRAMENTO, CA 95833-9754	N/A	PC	GENERAL OPERATING SUPPORT	740,000.
SMALL BUSINESS MAJORITY FOUNDATION INC. 1015 15TH STREET NW, SUITE 450 WASHINGTON, DC 20005	N/A	PC	PROMOTING IMPLEMENTATION OF PAID FAMILY LEAVE POLICIES IN CALIFORNIA	350,000.
SOUTHERN CALIFORNIA GRANTMAKERS 1000 NORTH ALAMEDA STREET, SUITE 230 LOS ANGELES, CA 90012	N/A	PC	GENERAL OPERATING SUPPORT	100,000.
SOUTHERN CALIFORNIA GRANTMAKERS 1000 NORTH ALAMEDA STREET, SUITE 230 LOS ANGELES, CA 90012	N/A	PC	BOOSTING NON-PROFIT REPORTING OF DEMOGRAPHIC INFORMATION TO TRACK PHILANTHROPIC FUNDING	50,000.
ST. VINCENT DE PAUL VILLAGE, INC. 3350 E STREET SAN DIEGO, CA 92102-3332	N/A	PC	GENERAL OPERATING SUPPORT FOR CA STORM RELIEF	10,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY 1608 FOURTH ST, STE 220, MAIL CODE 5940 BERKELEY, CA 94710-1749	N/A	PC	FEDERAL POLICY RESEARCH ON CARE WORKERS	175,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY 1608 FOURTH ST, STE 220, MAIL CODE 5940 BERKELEY, CA 94710-1749	N/A	PC	OTHERING AND BELONGING INSTITUTES BLUEPRINT FOR BELONGING PROJECT	450,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY C/O SPONSORED PROJECTS OFFICE, 1608 FOURTH ST, STE 220, MAIL CODE 5940 BERKELEY, CA 94710-1749	N/A	PC	SUPPORTING THE CALIFORNIA EARLY CARE AND EDUCATION (ECE) WORKFORCE STUDY	200,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA AT BERKELEY 1608 FOURTH ST, STE 220, MAIL CODE 5940 BERKELEY, CA 94710-1749	N/A	PC	EMPOWER COMMUNITY VOICES IN YOUTH HOMELESSNESS RESEARCH	200,000.
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN FRANCISCO 490 ILLINOIS STREET, 4TH FLOOR BOX 0962 SAN FRANCISCO, CA 94143-0962	N/A	PC	IMPROVE ACCESS TO DOMESTIC VIOLENCE AND SOCIAL MEDICINE RESEARCH AND RESOURCES	225,000.
THE UCLA FOUNDATION 10889 WILSHIRE BOULEVARD, SUITE 1100 LOS ANGELES, CA 90024	N/A	PC	ADDRESSING DOMESTIC VIOLENCE IN THE CHILD WELFARE SYSTEM	100,000.
TIDES CENTER PO BOX 889385 LOS ANGELES, CA 90088-9385	N/A	PC	SOLUTIONS-BASED JOURNALISM TO ADVANCE RESTORATIVE APPROACHES FOR DOMESTIC VIOLENCE	150,000.
TIDES CENTER PO BOX 889385 LOS ANGELES, CA 90088-9385	N/A	PC	SGP: CAPACITY DEVELOPMENT FOR DOMESTIC WORKER LEADERS IN CALIFORNIA	50,000.
TIME FOR CHANGE FOUNDATION PO BOX 25040 SAN BERNARDINO, CA 92406	N/A	PC	EVALUATING STRENGTHS-BASED MULTIGENERATIONAL MODELS THAT PREVENT DOMESTIC VIOLENCE	400,000.
UNIVERSITY OF SOUTHERN CALIFORNIA 3502 WATT WAY LOS ANGELES, CA 90007	N/A	PC	SUPPORTING CALIFORNIA JOURNALISTS TO IMPROVE HEALTH EQUITY AND DOMESTIC VIOLENCE REPORTING	609,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
URBAN HABITAT 2000 FRANKLIN STREET OAKLAND, CA 94612	N/A	PC	GENERAL OPERATING SUPPORT	125,000.
VALORUS 1215 K STREET #1850 SACRAMENTO, CA 95814-3956	N/A	PC	GENERAL OPERATING SUPPORT	250,000.
VISION Y COMPROMISO 15808 HESPERIAN BOULEVARD, #708 SAN LORENZO, CA 94580	N/A	PC	EVALUATING STRENGTHS-BASED MULTIGENERATIONAL MODELS THAT PREVENT DOMESTIC VIOLENCE	400,000.
WATSONVILLE LAW CENTER 315 MAIN ST STE 207 WATSONVILLE, CA 95076-4624	N/A	PC	INCREASING ACCESS TO PAID FAMILY LEAVE FOR IMMIGRANT, MIXTECO-SPEAKING, FARMWORKER COMMUNITIES	150,000.
WEAVE, INC. 1900 K STREET SACRAMENTO, CA 95811	N/A	PC	SGP: BUILDING ORGANIZATIONAL CAPACITY TO SUSTAIN DOMESTIC VIOLENCE MULTISECTOR	30,000.
Total from continuation sheets				

Part XIV Supplementary Information

3 Grants and Contributions Approved for Future Payment (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NATIONAL ACADEMY OF SCIENCES 500 5TH STREET NORTHWEST WASHINGTON, DC 20001	N/A	PC	GENERAL OPERATING SUPPORT	50,000.
PROJECT HOPE - THE PEOPLE-TO-PEOPLE HEALTH FOUNDATION, INC. 1220 19TH STREET NORTHWEST WASHINGTON, DC 20036	N/A	PC	HEALTH AFFAIRS COMMUNITY VOICES PROJECT: AMPLIFYING LIVED EXPERIENCES FOR HEALTH EQUITY IN	100,000.
THE TRANSLATIN COALITION 3055 WILSHIRE BOULEVARD LOS ANGELES, CA 90010	N/A	PC	GENERAL OPERATING SUPPORT	50,000.
TIDES CENTER 225 BUSH STREET LOS ANGELES, CA 90088-9385	N/A	PC	BUILD THE CAPACITY OF NONPROFIT ORGANIZATIONS TO GATHER FEEDBACK FROM THE COMMUNITIES THEY	127,500.
TIME FOR CHANGE FOUNDATION ZACA ROAD SAN BERNARDINO, CA 92406	N/A	PC	EMERGING LEADERS	30,000.
UNITED WAY OF THE BAY AREA 550 KEARNY STREET SAN FRANCISCO, CA 94108	N/A	PC	OUTREACH TO SUPPORT INTERNAL REVENUE SERVICE (IRS) DIRECT FILE TOOL ADOPTION	50,000.
UNITED WAYS OF CALIFORNIA 1107 FAIR OAKS AVENUE SOUTH PASADENA, CA 91030-3311	N/A	PC	EXPANDING ACCESS AND SUPPORT FOR IMMIGRANT TAX FILERS	100,000.
WOMENS FOUNDATION OF CALIFORNIA 1301 CLAY STREET OAKLAND, CA 94612	N/A	PC	ASSESSING OPPORTUNITIES FOR HOMELESSNESS AND DOMESTIC VIOLENCE COLLABORATION IN	77,050.
Total from continuation sheets				584,550.

Part XIV **Supplementary Information**

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - ASIAN RESOURCES, INC.

ADDRESSING HEALTH DISPARITIES THROUGH IMPROVING AANHPI DATA COLLECTION

AND REPORTING PRACTICES WITHIN LOCAL AND STATE DEPARTMENTS OF PUBLIC

HEALTH

NAME OF RECIPIENT - CONTRA COSTA FAMILY JUSTICE CENTER ALLIANCE

SGP: CAPACITY BUILDING SUPPORT TO THE ALLIANCE'S DOMESTIC VIOLENCE

PREVENTION MULTISECTOR COLLABORATIVE

NAME OF RECIPIENT - GEORGE WASHINGTON UNIVERSITY

THE FUNDERS FORUM ON ACCOUNTABLE HEALTH: SCALING COMMUNITY-DRIVEN

HEALTH EQUITY INITIATIVES

NAME OF RECIPIENT - PREVENTION INSTITUTE

SAFETY AND HEALING IN NETWORKS OF EQUITY (SHINE): A COHORT OF

MULTISECTOR COLLABORATIVES FOR DOMESTIC VIOLENCE PREVENTION

NAME OF RECIPIENT - SOUTHERN CALIFORNIA GRANTMAKERS

BOOSTING NON-PROFIT REPORTING OF DEMOGRAPHIC INFORMATION TO TRACK

PHILANTHROPIC FUNDING OF BIPOC-LED ORGANIZATIONS

NAME OF RECIPIENT - WEAVE, INC.

SGP: BUILDING ORGANIZATIONAL CAPACITY TO SUSTAIN DOMESTIC VIOLENCE

MULTISECTOR COLLABORATIVE

Part XIV **Supplementary Information**

3b Grants and Contributions Approved for Future Payment Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - CULTIVA LA SALUD

COMMUNITY VOICES PROJECT: BRIDGING COMMUNITY AND MEDIA TO CHANGE

NARRATIVES FOR POLICY AND SYSTEMS CHANGE

NAME OF RECIPIENT - PROJECT HOPE - THE PEOPLE-TO-PEOPLE HEALTH

FOUNDATION, INC.

HEALTH AFFAIRS COMMUNITY VOICES PROJECT: AMPLIFYING LIVED EXPERIENCES

FOR HEALTH EQUITY IN ACADEMIC PUBLISHING

NAME OF RECIPIENT - TIDES CENTER

BUILD THE CAPACITY OF NONPROFIT ORGANIZATIONS TO GATHER FEEDBACK FROM

THE COMMUNITIES THEY SERVE TO IMPROVE PROGRAM IMPACT

NAME OF RECIPIENT - WOMENS FOUNDATION OF CALIFORNIA

ASSESSING OPPORTUNITIES FOR HOMELESSNESS AND DOMESTIC VIOLENCE

COLLABORATION IN ORANGE COUNTY

**Schedule B
(Form 990)**(Rev. December 2024)
Department of the Treasury
Internal Revenue Service**Schedule of Contributors****Attach to Form 990, 990-EZ, or 990-PF.**
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

Name of the organization

CALIFORNIA PHYSICIANS' SERVICE FDN
DBA BLUE SHIELD OF CALIFORNIA FDN

Employer identification number

94-2822302

Organization type (check one):**Filers of:****Section:**

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year \$

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (Rev. 12-2024)

Name of organization	Employer identification number
CALIFORNIA PHYSICIANS' SERVICE FDN	
DBA BLUE SHIELD OF CALIFORNIA FDN	94-2822302

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BLUE SHIELD OF CALIFORNIA 601 12TH STREET OAKLAND, CA 94607	\$ 20,126,479.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

94-2822302

94-2822302

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

[illegible]

Name of organization	Employer identification number
CALIFORNIA PHYSICIANS' SERVICE FDN	
DBA BLUE SHIELD OF CALIFORNIA FDN	94-2822302

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
25,401,063.	22,778,477.	0.	0.	2,622,586.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
19,023,038.	19,965,479.	0.	0.	-942,441.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	1,680,145.

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
NORTHERN TRUST FUND	2,397,391.	0.	2,397,391.	2,397,391.	
TO PART I, LINE 4	2,397,391.	0.	2,397,391.	2,397,391.	

FORM 990-PF

OTHER INCOME

STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	6,842.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	6,842.	0.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	63,000.	0.		63,000.
TO FORM 990-PF, PG 1, LN 16B	63,000.	0.		63,000.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROGRAM CONSULTING & EVALUATION	4,200,031.	0.		4,200,031.
INVESTMENT MANAGEMENT FEES	9,784.	9,784.		0.
TO FORM 990-PF, PG 1, LN 16C	4,209,815.	9,784.		4,200,031.

FORM 990-PF

TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX EXPENSES	252,125.	0.		0.
TO FORM 990-PF, PG 1, LN 18	252,125.	0.		0.

FORM 990-PF	OTHER EXPENSES		STATEMENT 7	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOARD MEETING EXPENSES	116,787.	0.		116,787.
HONORARIA EXPENSES	21,725.	0.		21,725.
INTERNAL/TEAM MEETINGS	25,137.	0.		25,137.
IT / TELECOMMUNICATIONS	192,807.	0.		192,807.
LICENSE & FEES	2,107.	0.		2,107.
MARKETING	300,032.	0.		300,032.
MEMBERSHIPS	150,068.	0.		150,068.
OFFICE SUPPLIES	12,515.	0.		12,515.
STAFF TRAINING & DEVELOPMENT	54,585.	0.		54,585.
STATE FILING FEE	800.	0.		800.
SUBSCRIPTIONS	9,595.	0.		9,595.
ACCRUAL TO CASH ADJUSTMENT	0.	0.		428,058.
EVENTS - HOSTED	44,998.	0.		44,998.
TO FORM 990-PF, PG 1, LN 23	931,156.	0.		1,359,214.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 8
DESCRIPTION	AMOUNT	
UNREALIZED GAIN ON INVESTMENTS	1,850,150.	
IN-KIND GIFTS OF PERSONNEL, ADMINISTRATIVE SERVICES, AND FACILITIES	8,113,314.	
TOTAL TO FORM 990-PF, PART III, LINE 3	9,963,464.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 9
DESCRIPTION	AMOUNT	
IN-KIND GIFTS OF PERSONNEL, ADMINISTRATIVE SERVICES, AND FACILITIES	8,113,314.	
TOTAL TO FORM 990-PF, PART III, LINE 5	8,113,314.	

FORM 990-PF	CORPORATE STOCK	STATEMENT 10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
U.S. COMMON STOCK	25,644,877.	25,644,877.
TOTAL TO FORM 990-PF, PART II, LINE 10B	25,644,877.	25,644,877.

FORM 990-PF		OTHER INVESTMENTS		STATEMENT 11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
FIXED INCOME FUNDS	FMV	49,955,278.	49,955,278.	
OTHER INVESTMENTS	FMV	249,155.	249,155.	
TOTAL TO FORM 990-PF, PART II, LINE 13		50,204,433.	50,204,433.	

FORM 990-PF	OTHER ASSETS		STATEMENT 12
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INVESTMENT INCOME	149,409.	157,477.	157,477.
EXCISE TAX RECEIVABLE	331.	45,841.	45,841.
TO FORM 990-PF, PART II, LINE 15	149,740.	203,318.	203,318.

FORM 990-PF

PART VII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ADRIANE LAMAR SNIDER C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	CHAIR, AUDIT COMMITTEE 1.00	9,000.	0.	2,679.
HELEN DUPLESSIS, M.D., M.P.H. C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	CHAIR, GOVERNANCE COMMITTEE 1.00	12,500.	0.	914.
KATHERINE FLORES, M.D. C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	CHAIR, HR COMMITTEE 1.00	10,500.	0.	828.
LUIS GRANADOS C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	TRUSTEE 1.00	9,000.	0.	0.
MARICELA RIOS C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	TRUSTEE 1.00	10,500.	0.	3,462.
RAYMOND J. BAXTER C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	TRUSTEE 1.00	13,500.	0.	507.
SHARON KIMBERLY BELSHE C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	BOARD CHAIR 1.00	10,000.	0.	566.
DEBORAH I. CHANG C/O BLUE SHIELD OF CA FOUNDATION, 315 MONTGOMERY STREET, SUITE 1200 SAN FRANCISCO, CA 94104	PRESIDENT AND CEO 40.00	0.	0.	0.

LISA DAVIS

C/O BLUE SHIELD OF CA FOUNDATION,
315 MONTGOMERY STREET, SUITE 1200
SAN FRANCISCO, CA 94104

TRUSTEE

1.000.0.0.

SANDY CLARKE

C/O BLUE SHIELD OF CA FOUNDATION,
315 MONTGOMERY STREET, SUITE 1200
SAN FRANCISCO, CA 94104

TRUSTEE

1.000.0.0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VII

75,000.

0.

8,956.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT
PART VI-B, LINE 5D

STATEMENT 14

GRANTEE'S NAME

MANATT

GRANTEE'S ADDRESS2049 CENTURY PARK EAST SUITE 1700
LOS ANGELES, CA 90067GRANT AMOUNT

50,000.

DATE OF GRANT

04/25/24

AMOUNT EXPENDEDPURPOSE OF GRANT

TO FUND THE DEVELOPMENT OF A PAPER THAT SPECIFICALLY INCLUDES INTIMATE PARTNER VIOLENCE/INTERPERSONAL SAFETY AS A HEALTH-RELATED SOCIAL NEED TO BE ADDRESSED BY STATE MEDICAID PROGRAMS. THE PAPER WILL ALSO HELP PROMOTE ADOPTION OF SCREENING MEASURES FOR THE FIVE DRIVER OF HEALTH DOMAINS FOOD, TRANSPORTATION, HOUSING, UTILITIES, AND INTERPERSONAL SAFETY/IPV ADOPTED IN MEDICARE PROGRAMS SO THAT PROVIDERS EXPERIENCE CONSISTENCY IN THEIR INCENTIVES FROM BOTH MEDICARE AND MEDICAID.

DATES OF REPORTS BY GRANTEE

FINAL REPORT: 07/01/24

ANY DIVERSION BY GRANTEE

NO DIVERSION OF GRANT FUNDS WAS FOUND.

RESULTS OF VERIFICATION

BLUE SHIELD OF CALIFORNIA FOUNDATION REVIEWED THE GRANT REPORTS RECEIVED BUT DID NOT UNDERTAKE ANY VERIFICATION OF THE GRANTEE'S REPORTS AS THERE HAS NOT BEEN ANY REASON TO DOUBT THEIR ACCURACY OR RELIABILITY (REG. 53.4945-5(C)).

GRANTEE'S NAME

HEALTH LEVEL SEVEN INTERNATIONAL

GRANTEE'S ADDRESS

455 E. EISENHOWER PKWT STE 300 # 025
ANN ARBOR, MI 48108

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
50,000.	02/28/24	

PURPOSE OF GRANT

TO FUND BSCF'S PARTNERSHIP OF THE GRAVITY PROJECT AT THE \$50,000 MEMBERSHIP LEVEL.

DATES OF REPORTS BY GRANTEE

FINAL REPORT: 02/01/25

ANY DIVERSION BY GRANTEE

NO DIVERSION OF GRANT FUNDS WAS FOUND.

RESULTS OF VERIFICATION

BLUE SHIELD OF CALIFORNIA FOUNDATION REVIEWED THE GRANT REPORTS RECEIVED BUT DID NOT UNDERTAKE ANY VERIFICATION OF THE GRANTEE'S REPORTS AS THERE HAS NOT BEEN ANY REASON TO DOUBT THEIR ACCURACY OR RELIABILITY (REG. 53.4945-5(C)) .

ACTIVITY ONE

DAYLIGHT DESIGN LLC
CONTRACT 1288 - CHANGING THE CONVERSATION CAMPAIGN 2024
DVAM CAMPAIGN AND JOURNALIST PLAYBOOK LAUNCH
IN THE FIRST HALF OF 2024, DAYLIGHT COLLABORATED WITH THE
BLUE SHIELD OF CALIFORNIA FOUNDATION AND A SIX-MEMBER
ADVISORY GROUP FORMED WITH THE HELP OF THE CALIFORNIA
PARTNERSHIP TO END DOMESTIC VIOLENCE (CPEDV) TO CO-DESIGN
AND DEVELOP VERSION ONE OF A JOURNALIST PLAYBOOK FOR
COVERING DOMESTIC VIOLENCE. THIS PLAYBOOK IS THE FOUNDATION
OF BLUE SHIELD OF CALIFORNIA FOUNDATION'S PARTICIPATION IN
THE ANNUAL DOMESTIC VIOLENCE AWARENESS MONTH. THIS APPROACH
SERVES TWO GOALS:
-A DVAM CAMPAIGN THAT WORKS IN SERVICE OF 'CHANGING THE
CONVERSATION' ABOUT DOMESTIC VIOLENCE AND ENGAGING WITH HOW
IT'S COVERED IN THE MEDIA.
-THE REFINEMENT AND DISTRIBUTION OF THE JOURNALIST PLAYBOOK.

EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 1

378,500.

ACTIVITY TWO

PERRY UNDEM LLC
CONTRACT 1296 - PUBLIC OPINION POLL - CALIFORNIA SURVEY
THE EDS IS SPEARHEADING THE NEXT ROUND OF THE PUBLIC OPINION
POLL AND WILL PARTNER WITH PERRYUNDEM TO COMMISSION THIS
PROJECT. THE OVERARCHING GOAL IS TO CONDUCT A STATEWIDE
SURVEY TO ASSESS PUBLIC OPINION THAT WILL ENABLE BLUE SHIELD
OF CALIFORNIA FOUNDATION (BSCF) TO HELP PARTNERS, ADVOCATES,
INFLUENCERS, AND DECISION-MAKERS UNDERSTAND WHAT
CALIFORNIANS WANT AND NEED. THIS ALSO OFFERS BSCF AN
OPPORTUNITY TO USE LEARNINGS TO INFORM THEIR DECISION-MAKING
FOR STRATEGIES AND BUILD EVIDENCE THAT CAN SUPPORT THEIR
WORK.
THIS CONTRACT WILL SUPPORT THE DEVELOPMENT AND EXECUTION OF
THE SURVEY THAT ALIGNS WITH THE TOPICS AND QUESTIONS OF
INTEREST OF THE FOUNDATION AND THEIR STAFF. THIS SCOPE
ENSURES QUANTITATIVE METHODS WILL TAKE PLACE AND RESULTS
WILL PROVIDE UPDATED/NEW DATA. IN ADDITION, THE TEAMS ARE
EXPLORING OPPORTUNITIES TO BRING IN QUALITATIVE WORK TO
INFORM THE SURVEY INSTRUMENT AND/OR SUPPLEMENT THE SURVEY.

EXPENSES

360,000.

TO FORM 990-PF, PART VIII-A, LINE 2

ACTIVITY THREE

IMPACT JUSTICE
CONTRACT 1263 - RESTORATIVE JUSTICE COHORT EVALUATION
IMPACT JUSTICE (IJ) WILL SUPPORT THE FOUNDATION IN
CONDUCTING A CROSS-COHORT EVALUATION THAT DEFINES AND
DOCUMENTS ORGANIZATION'S IMPLEMENTATION/MODEL OF RESTORATIVE
PRACTICES AND ASSESSES THE PROMISING PRACTICES OF THEIR
RESTORATIVE RESPONSES THAT PROMOTE HEALING, SAFETY, AND
ACCOUNTABILITY TO END AND PREVENT DOMESTIC VIOLENCE, WHILE
ALSO PROVIDING EVALUATION TECHNICAL SUPPORT TO GRANTEES. THE
SCOPE OF THIS EVALUATION IS DESIGNED TO STRENGTHEN
COMMUNITY-BASED PRACTICES AND BUILD EVIDENCE FOR THE
PREVENTION OF DOMESTIC VIOLENCE WITH RESTORATIVE PRINCIPLES.
IJ WILL DEVELOP AND CONDUCT A LEARNING EVALUATION THAT WILL
INFORM GRANTEES, FUNDERS, AND THE FIELD OF VIOLENCE
PREVENTION ABOUT USING RESTORATIVE RESPONSES AS AN
ALTERNATIVE SOLUTION TO ADDRESS AND END DOMESTIC VIOLENCE.
DURING THE DURATION OF THE CONTRACT, IJ WILL SUPPORT
GRANTEE'S EVALUATION AND LEARNING ACTIVITIES TO ASSESS KEY
OBJECTIVES AND OUTCOMES AT THE

EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 3

346,020.

ACTIVITY FOUR

BRIGHT RESEARCH GROUP
CONTRACT 1302- BRG DEV EVAL YR 3
BRG WILL DESIGN AND IMPLEMENT A GRANTEE-CENTERED EVALUATION
TO ACHIEVE THE FOLLOWING GOALS: 1) DESIGN AN INQUIRY THAT IS
ACTIONABLE FOR GRANTEES AND PROVIDES INSIGHTS TO ALIGNING
SYSTEMS WITH COMMUNITY PRIORITIES APPROACH AREA; 2)
DISSEMINATE LEARNINGS FROM THE ECOSYSTEM MAPPING AND OTHER
EVALUATION ACTIVITIES THAT TELL THE STORY OF HOW SYSTEMS
CHANGE CONTRIBUTES TO HEALTH EQUITY AND COMMUNITY IMPACT; 3)
BUILD THE CAPACITY OF ALIGNING SYSTEMS WITH COMMUNITY
PRIORITIES APPROACH TEAM TO TEST THEIR HYPOTHESIS AND TELL
THE STORY OF GRANTEE IMPACT.

EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 4

127,500.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XIV, LINES 2A THROUGH 2D

STATEMENT 19

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BLUE SHIELD OF CALIFORNIA FOUNDATION
315 MONTGOMERY STREET, SUITE 1200
SAN FRANCISCO, CA 94104

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

415-229-6080

BSCF GRANTS

EMAIL ADDRESS

BSCF@BLUESHIELDCAFOUNDATION.ORG

FORM AND CONTENT OF APPLICATIONS

GO TO OUR WEBSITE: [HTTPS://BLUESHIELDCAFOUNDATION.ORG/GRANTS](https://blueshieldcafoundation.org/grants)

ANY SUBMISSION DEADLINES

SEE WEBSITE FOR CURRENT DEADLINES

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE BLUE SHIELD OF CALIFORNIA FOUNDATION IS COMMITTED TO MAKING HEALTHCARE ACCESSIBLE, EFFECTIVE, AND AFFORDABLE FOR ALL CALIFORNIANS, PARTICULARLY UNDERSERVED PEOPLE, AND TO ENDING DOMESTIC VIOLENCE. IN 2024, THE FOUNDATION DISTRIBUTED RESOURCES ACROSS SEVEN PRIORITY AREAS, WHICH INVOLVED GRANT MAKING AND OTHER PROGRAMMATIC ACTIVITIES (E.G., RESEARCH, COMMUNICATIONS, COMMUNITY ENGAGEMENT AND PUBLIC AFFAIRS) THAT ADVANCE THE OUTCOMES SOUGHT BY THE FOUNDATION'S LONG TERM STRATEGY. PLEASE SEE OUR WEBSITE FOR MORE DETAILS ON PROGRAMMATIC PRIORITIES.

GENERAL EXPLANATION	STATEMENT 20
---------------------	--------------

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART III - OTHER INCREASES AND DECREASES IN NET ASSETS

EXPLANATION:

ASSETS OR FUND BALANCES:

CALIFORNIA PHYSICIAN'S SERVICE (DBA BLUE SHIELD OF CALIFORNIA, INC.), A SUBSTANTIAL CONTRIBUTOR, PAID THE FOUNDATION'S STAFFING COST AND MUCH OF ITS ADMINISTRATIVE COSTS. CALIFORNIA PHYSICIANS' SERVICE (DBA BLUE SHIELD OF CALIFORNIA, INC.) RECEIVED NO REIMBURSEMENT OR COMPENSATION FOR THESE COSTS, WHICH WERE RECORDED AS AN IN-KIND GIFT BY THE FOUNDATION. THE ESTIMATED VALUE OF THE ADMINISTRATIVE COSTS AND PERSONNEL PROVIDED TO THE FOUNDATION WAS APPROXIMATELY: \$8,113,314.