The Samuel Lawrence Foundation

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The Samuel Lawrence Foundation

aka SLF
Del Mar, CA
http://www.samuellawrencefoundation.org
(858)481-1673

MISSION

The Samuel Lawrence Foundation (SLF), a non-profit organization, was founded in 2010 to encourage innovation in science and medicine, arts, and education through programs and advocacy. Our mission is to promote human interaction in communities by encouraging broader access to arts, culture, science and medicine. SLF acts as a "community engagement bridge," connecting local and international groups to move forward with bold vision and actions to address the most pressing needs facing our nation and the world. SLF undertakes projects of philanthropy, reform, and community engagement through funding small teams of inspired individuals, often with mini-grants. SLF also acts as a fiscal agent, incubating young, change-making organizations working toward obtaining their own 501(c)3 status.

EIN
27-1030462

RULING YEAR
2010

IRS SUBSECTION
501(c)(3) Public Charity

FOUNDING YEAR
2010

MAIN ADDRESS
P.O. Box F
Del Mar, CA
92014

AFFILIATION TYPE
Independent Organization

CONTACT
Mr Bart Ziegler, President
(858) 481-1673
bart@samuellawrencefoundation.org

PRESIDENT
Bart Ziegler

BOARD CHAIR
Bart Ziegler, PhD.

SUBJECT AREA
Environment
Health
Public safety

NTEE Code
Single Organization Support (M11)
Single Organization Support (C11)
Single Organization Support (E11)
PROGRAMS

1. San Onofre and Beyond
   Population(s) served: Adults

2. Dance Start
   Population(s) served: Children

3. Access to Music Campaign
   Population(s) served: Children and youth

POPULATIONS SERVED

1. Children
2. Adults
3. Low-income people
4. Academics
5. Artists and performers

COMPLIANCE

- IRS Pub 78 Verified as of July 2023
- IRS BMF 509(a) (1) as of July 10, 2023
- A-133 Audit Required/Performed?
- Conflict of Interest Policy
- Written whistleblower policy
- Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- Board Practices Reported?
- Diversity Data Reported?
- Number of Independent Board Members
Programs & Results

**San Onofre and Beyond**

**Population(s) Served:** General/Unspecified

SLF aims to create and support a multi-faceted and multi-sectored collaboration to consider alternatives that ensure safe nuclear waste storage at the San Onofre Nuclear Generating Station. SLF is determined to facilitate a consensus-building process that breaks through this current barrier by synthesizing the research and expertise of global nuclear scientists and industry experts and engaging public officials, citizens, and activists to create informed solutions. By operating at the intersection of nuclear science, community engagement, and politics, SLF is cultivating a more positive climate for local, regional, and national collaboration nuclear energy issues. Now is the time to re-engage the broader public and private sector in the unplanned consequences of nuclear energy generation. Nuclear waste—dangerously radioactive for over 100,000 years— is accumulating across the U.S. and the federal government has provided nowhere to store it.

**Dance Start**

**Population(s) Served:** n/a

Dance Start (formerly Dance Connection for Kids) seeks to enrich the education and development of children enrolled in Head Start by teaching dance movement. The program teaches choreography, rhythm, and music appreciation during 50 of the 52 weeks of the year at three Head Start Centers in North County San Diego. Our program democratizes dance and leads to more diverse representation in dancers and instruction. The Samuel Lawrence Foundation provides funding and aims to develop the project throughout the rest of San Diego.

**Access to Music Campaign**

**Population(s) Served:** n/a

The Samuel Lawrence Foundation connects youth and their families with enriching experiences in the arts across music and dance. Annually, SLF partners with various performing arts groups to provide families and youth tickets to music and dance performances. We believe this opportunity for students and their families to attend a classical symphony concert or ballet performance free of cost cultivates our collective community appreciation of the impact the arts have in society.
CHARTING IMPACT

What is the organization aiming to accomplish?

The Samuel Lawrence Foundation (SLF) and regional experts believe there are safer storage configurations Southern California Edison can be implemented. There may be alternative storage sites at significantly higher ground, decreasing current risk factors. Unfortunately—because the issue is so complicated and multi-faceted with no clear solution—the utility, scientists, activists, and citizens have been unable to reach a scientifically-defensible consensus solution to the storage issues.

The SLF approach to meeting its goals involve action research, scientific and technical research, legislative education and advocacy, public policy development, community education and engagement, collaboration development, long-term systems thinking and analysis, and the use of evocative framing in order to minimize the kinds of serious, unintended consequences and partial solutions used to date.

In 2018, SLF expanded the name of its San Onofre program to San Onofre and Beyond to include the geographic breadth of the issue and related subject matter, such as climate change. What follows are the expanded set of 2020 and beyond goals and objectives based on the lessons learned as well as on continuation of successful efforts.

The Samuel Lawrence Foundation has pledged to continue its critical work through its San Onofre and Beyond program and achieve the following five-year goals:

Goal 1: Develop relationships and create a local and state coalition to advance safe storage solutions
Goal 2: Support technical research with solutions for nuclear waste storage issues
Goal 3: Engage in a national public conversation about the realities of nuclear energy waste storage
Goal 4: Convene the leading regional, national, and international experts in nuclear energy and related fields to pool the latest research and social thinking into more comprehensive U.S. policy and procedures
Goal 5: Initiate national legislation based on best practices defined by nuclear expert think tank

What are the organization’s key strategies for making this happen?

The accumulation of 50-years of high level radioactive waste at San Onofre Nuclear Generating Station (SONGS) remains a significant threat to the health, safety, and economic vitality to the 8.4 million residents in Southern California. Safer on-site storage is complicated by geological, tidal, terrorism, and hydrogen explosions risks as well as the absence of effective regulatory agency oversight. This critical regional issue is also compounded by the lack of a consent-based storage alternative elsewhere in the nation. Creating a further sense of urgency for an alternative storage solution is the location of the shuttered plant on a seismic fault-line. A tsunami could reach the San Onofre plant and inundate the storage vault. The storage system is technically indefensible and also vulnerable to terrorist strikes.

The Samuel Lawrence Foundation (SLF) aims to create and support a multi-faceted and multi-sectored collaboration to consider alternatives that ensure safe nuclear waste storage at the San Onofre Nuclear Generating Station. SLF is determined to facilitate a consensus-building process that breaks through this current barrier by synthesizing the research and expertise of global nuclear scientists and industry experts and engaging public officials, citizens, and activists to create informed solutions. By operating at the intersection of nuclear science, community engagement, and politics, SLF is cultivating a more positive climate for local, regional, and national collaboration nuclear energy issues. Now is the time to re-engage the broader public and private sector in the unplanned consequences of nuclear energy generation. Nuclear waste—dangerously radioactive for over 100,000 years—is accumulating across the U.S. and the federal government has provided nowhere to store it.

What are the organization’s capabilities for doing this?

SLF, founded in 2010, learned of the public health risks with the San Onofre Nuclear plant. SLF began to gather information, experts, and community members to address these issues. Leading the way to inform the public about the issues and potential hazards of nuclear power plants, SLF co-facilitated a collaborative effort from 2011 to 2013 and sponsored nearly a dozen international
and then undercut expenses to take the remaining decommissioning fund a

• In 2019, a new trend emerged among for-profit companies where they buy up nuclear power plants in the decommissioning phase
• Uranium is a finite resource.
• There are long-term public health, safety concerns, and economic impacts that are not considered in public policy debates.
• The U.S. is not seriously considering other country’s research, best practices, and potential solutions for nuclear waste.
• Special interests, particularly industrial economic interests, have too much influence in national the regulatory, political, and
legislative sphere.

With the shut-down in 2013, most residents thought the situation had been completely resolved with the decommissioning of SONGS
and that Southern California Edison (SCE), with the federal government, would create safe temporary storage on–site until the 50–
years' worth of spent nuclear waste could be moved to an undetermined national repository sometime in the future.
At the end of 2017, SLF ramped up its efforts to publicize and resolve these issues. This work included educating more elected officials
by preparing them to take a proactive stance on nuclear safe storage; conducting a comprehensive publicity and community
engagement effort that includes television, radio, and newspaper stories on the issue; and, co-creating a "1960’s style community
rally (Songs for S.O.N.G.S.) featuring music, inspiration, and education. These efforts resulted in catalyzing 600 new supporters;
publishing several scientific studies on nuclear waste canisters and the potential economic impact of a nuclear accident; and
cultivating a more positive climate for local, regional, and national collaboration on nuclear energy issues.
Capitalizing the “Songs for S.O.N.G.S.” event opportunity, SLF was able to forge a partial consensus: “inspire people to take sustained
collective action to demand safer storage of nuclear waste at San Onofre Nuclear Generating Station (SONGS) – the largest
environmental issue you've never heard about.” This became the ‘rallying call’ that drew people together. Much more work is
required. Given their 10–year successful track record and envisioning the next ten years of its work, SLF has created a detailed work
plan with specific action steps and progress indicators.

What have and haven't they accomplished so far?

Accomplishments of SLF work:

• Leading the way to inform the public about the potential hazards of nuclear power plants, SLF co–facilitated a collaborative effort
from 2011 to 2013 and sponsored nearly a dozen international conferences entitled, "Fukushima: Ongoing Lessons," in Japan and the
United States. This involved pulling together the research and expertise of global nuclear scientists and industry experts and educating
public officials, citizens, and activists to make informed decisions concerning the liabilities of nuclear power plants. In 2013, SLF and
Friends of Earth organized a widely televised public conference held in San Diego, featuring the former Prime Minister of Japan and
the former U.S. Nuclear Regulatory Commission Chairman. Three days later, the San Onofre nuclear power plant closed.
• Arranged a symposium in New York City’s 92nd St Y for the aging Indian Point Energy Center nuclear power plant located 30 miles
from Manhattan. This event included an introduction by Jean–Michele Cousteau, was moderated by RiverKeeper’s Paul Gallay and
included Ralph Nader, nuclear experts and other world leaders. The following day, SLF was also invited to present a conference at
the Boston State Capital to discuss Pilgrim Nuclear Power Station. This collaborative work assisted citizen groups in New York and
Boston to seek early shutdown of the Indian Point and Pilgrim nuclear plants as well as two nuclear reactors at the I kata Nuclear
Power Plant in Ikata, Japan.
• SLF is the selected nonprofit partner joining the Patagonia Surf Activism Tour - Summer 2019 to highlight the importance of taking
action for the safest storage of nuclear waste. The events include SLF speakers and others informing the public how we can all protect
our planet.

Much more work is required. Given SLF’s 10–year successful track record and envisioning the next ten years of its work, SLF reflects
on what was learned along the way and what must be incorporated into future work. The conclusions are:
• There are no scientific studies showing the safe storage of nuclear waste over a period of time because the nuclear energy technology
and storage configurations are relatively new and untested. There is little consensus about how to solve the problem of safe storage,
making it hard for the activist and scientific community to create a common message.
• Special interests, particularly industrial economic interests, have too much influence in national the regulatory, political, and
legislative sphere.
• The U.S. is not seriously considering other country’s research, best practices, and potential solutions for nuclear waste.
• There are long–term public health, safety concerns, and economic impacts that are not considered in public policy debates.
• Uranium is a finite resource.
• In 2019, a new trend emerged among for–profit companies where they buy up nuclear power plants in the decommissioning phase
and then undercut expenses to take the remaining decommissioning fund a
## Financials

**FISCAL YEAR START:** 01/01  
**FISCAL YEAR END:** 12/31

### Financial Trends Analysis

#### Business Model Indicators

<table>
<thead>
<tr>
<th>Profitability</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
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<tbody>
<tr>
<td>Unrestricted surplus (deficit) before depreciation</td>
<td>$169,442</td>
<td>-$78,864</td>
<td>-$65,474</td>
<td>$95,704</td>
<td>-$30,525</td>
</tr>
<tr>
<td>As a % of expenses</td>
<td>38.1%</td>
<td>-19.3%</td>
<td>-28.2%</td>
<td>75.5%</td>
<td>-12.8%</td>
</tr>
<tr>
<td>Unrestricted surplus (deficit) after depreciation</td>
<td>$169,442</td>
<td>-$78,864</td>
<td>-$65,474</td>
<td>$95,704</td>
<td>-$30,525</td>
</tr>
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<td>As a % of expenses</td>
<td>38.1%</td>
<td>-19.3%</td>
<td>-28.2%</td>
<td>75.5%</td>
<td>-12.8%</td>
</tr>
</tbody>
</table>

#### Revenue Composition

<table>
<thead>
<tr>
<th>Total revenue (unrestricted &amp; restricted)</th>
<th>$616,204</th>
<th>$330,108</th>
<th>$166,564</th>
<th>$222,443</th>
<th>$257,426</th>
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</thead>
<tbody>
<tr>
<td>Total revenue, % change over prior year</td>
<td>144.3%</td>
<td>-46.4%</td>
<td>-49.5%</td>
<td>33.5%</td>
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<td>Program services revenue</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>Membership dues</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>Investment income</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Government grants</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>All other grants and contributions</td>
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<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
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<tr>
<td>Other revenue</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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</tbody>
</table>

#### Expense Composition

<table>
<thead>
<tr>
<th>Total expenses before depreciation</th>
<th>$445,314</th>
<th>$408,973</th>
<th>$232,038</th>
<th>$126,739</th>
<th>$237,951</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total expenses, % change over prior year</td>
<td>74.3%</td>
<td>-8.2%</td>
<td>-43.3%</td>
<td>-45.4%</td>
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<td>Personnel</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>Professional Fees</td>
<td>0.4%</td>
<td>11.0%</td>
<td>13.8%</td>
<td>14.0%</td>
<td>6.7%</td>
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<td>Occupancy</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Interest</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>Pass-Through</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>All other expenses</td>
<td>99.6%</td>
<td>89.0%</td>
<td>86.2%</td>
<td>86.0%</td>
<td>93.3%</td>
</tr>
</tbody>
</table>

### Created in Partnership with

Nonprofit Finance Fund®
Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

<table>
<thead>
<tr>
<th>Full Cost Components (estimated)</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expenses (after depreciation)</td>
<td>$445,314</td>
<td>$408,973</td>
<td>$232,038</td>
<td>$126,739</td>
<td>$237,951</td>
</tr>
<tr>
<td>One Month of Savings</td>
<td>$37,110</td>
<td>$34,081</td>
<td>$19,337</td>
<td>$10,562</td>
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<td>Debt Principal Repayment</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Fixed Asset Additions</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Total Full Costs (estimated)</td>
<td>$482,424</td>
<td>$443,054</td>
<td>$251,375</td>
<td>$137,301</td>
<td>$257,780</td>
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</tbody>
</table>

Capital Structure Indicators

Liquidity

- Months of cash: 4.6, 2.8, 1.6, 11.5, 7.1
- Months of cash and investments: 4.6, 2.8, 1.6, 11.5, 7.1
- Months of estimated liquid unrestricted net assets: 4.6, 2.7, 1.3, 11.5, 4.6

Balance Sheet Composition

<table>
<thead>
<tr>
<th>Cash</th>
<th>$170,128</th>
<th>$94,601</th>
<th>$30,629</th>
<th>$121,068</th>
<th>$141,525</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Receivables</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Gross land, buildings, and equipment (LBE)</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Accumulated depreciation (% of LBE)</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Liabilities (as % of assets)</td>
<td>0.3%</td>
<td>4.1%</td>
<td>17.5%</td>
<td>0.1%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Unrestricted net assets</td>
<td>$169,607</td>
<td>$90,743</td>
<td>$25,269</td>
<td>$120,973</td>
<td>$90,448</td>
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<tr>
<td>Temporarily restricted net assets</td>
<td>$0</td>
<td>$0</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Permanently restricted net assets</td>
<td>$0</td>
<td>$0</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Total restricted net assets</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$50,000</td>
</tr>
<tr>
<td>Total net assets</td>
<td>$169,607</td>
<td>$90,743</td>
<td>$25,269</td>
<td>$120,973</td>
<td>$140,448</td>
</tr>
</tbody>
</table>

Key Data Checks

Material Data Errors

- No | No | No | No | No | No

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- Formulas for key metrics
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
Operations

Source: Self-Reported by Organization, June 2023

PRESIDENT
Bart Ziegler PhD.

Bart currently directs The Samuel Lawrence Foundation, a non-profit foundation which promotes innovations in education and science. The foundation supports often overlooked directions in science and education. In 2013 the Foundation supported public conferences titled, "Fukushima: ongoing lessons," where a panel of top international leaders spoke about the risks of nuclear power. Prior to his community work, Bart spent 20 years in the biotechnology industry researching, advising, and investing in novel technology. He spent five years as a chemist developing analytical standards for the EPA, and purifying, “dopants” for wafer chip manufacture with two chemical companies, and five years as a neuroscientist at the University of California, San Diego mapping dopamine in the forebrain and studying circadian rhythms in rodents. He holds a PhD in community and environmental medicine from the University of California, Irvine.

BOARD CHAIR
Bart Ziegler, PhD.
The Samuel Lawrence Foundation

BOARD MEMBERS
Chris Hoover
Technology Executive
Farley Ziegler
Filmmaker
Charles Ziegler
Financial Executive
Lindsay Bazett
Biologist
Holly Pickerel
Design Director, Corporativo Atelier
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

### FISCAL YEAR 2021

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bart Ziegler</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Farley Ziegler</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Christopher Hoover</td>
<td>Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Cathy Iwane</td>
<td>Board Member</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Charles Ziegler</td>
<td>Board Member</td>
<td>$0</td>
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<tr>
<td>Holly Pickerel</td>
<td>Co-Founder</td>
<td>$0</td>
<td>$0</td>
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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES
### FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bart Ziegler</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Farley Ziegler</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Christopher Hoover</td>
<td>Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Cathy Iwane</td>
<td>Board Member</td>
<td>$0</td>
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<td>Charles Ziegler</td>
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<td>Elliot Rosenberger</td>
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<td>Alexis Dixon</td>
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<td>$0</td>
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<tr>
<td>Holly Pickerel</td>
<td>Board Member</td>
<td>$0</td>
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# OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

## FISCAL YEAR 2019

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
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</thead>
<tbody>
<tr>
<td>Bart Ziegler</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Farley Ziegler</td>
<td>Secretary</td>
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<tr>
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<tr>
<td>Jessie Speer</td>
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<tr>
<td>Holly Pickerel</td>
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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

**FISCAL YEAR 2018**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
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<tbody>
<tr>
<td>Bart Ziegler</td>
<td>President</td>
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<td>$0</td>
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<tr>
<td>Rita MacDonald</td>
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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

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Paid Preparers
FISCAL YEAR 2021

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<tbody>
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<td>LUCIA PALM</td>
<td>752105802</td>
<td>391 S VINE STREET, ESCONDIDO CA 92025</td>
<td>7607370698</td>
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Paid Preparers
FISCAL YEAR 2020

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<tbody>
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<td>391 S VINE STREET, ESCONDIDO CA 92025</td>
<td>7607370698</td>
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Paid Preparers
FISCAL YEAR 2019

<table>
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<tbody>
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<td>LUCIA PALM</td>
<td>752105802</td>
<td>391 S VINE STREET, ESCONDIDO CA 92025 USA</td>
<td>760-737-0698</td>
</tr>
</tbody>
</table>
**BOARD LEADERSHIP PRACTICES**

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

### BOARD ORIENTATION & EDUCATION

Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?

| Yes |

### CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

| No |

### ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

| No |

### BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

| No |

### BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

| No |
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization’s leader identifies as:

- **Race & Ethnicity**: White/Caucasian/European
- **Gender Identity**: Male
- **Sexual Orientation**: Decline to state
- **Disability Status**: Decline to state

### Race & Ethnicity

- Board Members: Asian/Asian American (0%), Black/African American (0%), Hispanic/Latino/Latinx (0%), Middle Eastern/North African (0%), Native American/American Indian/Alaska Native/Indigenous (0%), Native Hawaiian/Pacific Islander (0%), White/Caucasian/European (83%), Multi-Racial/Multi-Ethnic (2+ races/ethnicities) (0%), People who prefer to identify with another race or ethnicity (0%), Unknown or decline to state (0%)
- Senior Staff: Asian/Asian American (0%), Black/African American (0%), Hispanic/Latino/Latinx (0%), Middle Eastern/North African (0%), Native American/American Indian/Alaska Native/Indigenous (0%), Native Hawaiian/Pacific Islander (0%), White/Caucasian/European (100%), Multi-Racial/Multi-Ethnic (2+ races/ethnicities) (0%), People who prefer to identify with another race or ethnicity (0%), Unknown or decline to state (0%)

### Gender Identity

- Board Members: Female (55%), Male (60%), Non-binary (0%), Unknown or decline to state (0%)
- Staff: Female (67%), Male (50%), Non-binary (0%), Unknown or decline to state (0%)
- Senior Staff: Female (55%), Male (100%), Non-binary (0%), Unknown or decline to state (0%)

### Sexual Orientation

No data

### Disability

No data.

We do not display staff or senior staff disability information for organizations with fewer than 15 staff.
Equity Strategies  Last Updated: 03/24/2022

Candid partnered with Equity in the Center - a project that works to shift mindsets, practices, and systems within the social sector to increase racial equity - to create this section. Learn More

Data

✔ We disaggregate data to adjust programming goals to keep pace with changing needs of the communities we support.

✔ We have long-term strategic plans and measurable goals for creating a culture such that one's race identity has no influence on how they fare within the organization.

Policies and processes

✔ We use a vetting process to identify vendors and partners that share our commitment to race equity.

✔ We help senior leadership understand how to be inclusive leaders with learning approaches that emphasize reflection, iteration, and adaptability.
# Appendix

## Key Documents

<table>
<thead>
<tr>
<th>IRS Forms 990</th>
<th>2021 990</th>
<th>2020 990</th>
<th>2019 990</th>
<th>2018 990</th>
<th>2017 990</th>
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</thead>
<tbody>
<tr>
<td>IRS Forms 990T</td>
<td>Not Available</td>
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<tr>
<td>Key Organization Documents</td>
<td>2020 Annual Report</td>
<td>Key Revenue &amp; Expense Data from Form 990</td>
<td>Key Balance Sheet Data from Form 990</td>
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<td></td>
</tr>
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</table>
The Samuel Lawrence Foundation

Aka SLF
P.O. Box F
Del Mar, CA 92014

- Foundation Status Code: PC*
- Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Location</th>
<th>Most recent IRS Publication 78</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samuel Lawrence Foundation</td>
<td>Del Mar, CA</td>
<td>July 2023</td>
</tr>
</tbody>
</table>

Deductibility status description
A public charity (50% deductibility limitation).

Verified with most recent Internal Revenue Bulletin
July 24, 2023

IRS Business Master File Details

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Most recent IRS BMF</th>
<th>Reason for Non-Private Foundation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAMUEL LAWRENCE FOUNDATION</td>
<td>July 10 2023</td>
<td>Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>EIN</th>
<th>IRS subsection</th>
<th>Ruling date</th>
</tr>
</thead>
<tbody>
<tr>
<td>27-1030462</td>
<td>This organization is a 501(c)(3) Public Charity</td>
<td>12/2010</td>
</tr>
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</table>

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. Learn more

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can’t be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee’s public charity classification under section 509(a)(1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.
- The IRS Business Master File lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.
- The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

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