



# OFFICE OF THE CITY ADMINISTRATOR



Edwin M. Lee, Mayor  
Naomi M. Kelly, City Administrator

March 26, 2013

Angela Calvillo, Clerk of the Board  
Board of Supervisors  
City Hall, Room 244  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

Subject: 2013 Combined Charities Annual Fundraising Drive, File No. 139187

Dear Ms. Calvillo:

Pursuant to Section 16.93-3 of the Administrative Code, my office has reviewed the applications to participate in the Annual Combined Charities Fundraising Drive. This review is in accordance with the criteria delineated in Administrative Code Section 16.93-2.

Our review indicates that all seven agencies that applied to participate have met the criteria determined by the Board of Supervisors. The agencies are: Asian Pacific Fund, Bay Area Black United Fund, Inc., Community Health Charities, Earth Share of California (Environmental Federation of California), Global Impact, Local Independent Charities and United Way of the Bay Area.

If you should have any questions or desire additional information, please contact Joan Lubamersky (554-4859) of my office.

Very truly yours,

A handwritten signature in cursive script that reads "Naomi M. Kelly".

Naomi M. Kelly  
City Administrator

Enclosures

cc: Applicant Federations

**SUMMARY OF FINDINGS**  
**2013 Review of Applications**  
**City and County of San Francisco Annual Combined Charities Fundraising Drive**

**SUMMARY OF METHODOLOGY AND FINDINGS**

Our review consisted of an examination of the materials provided in File No. 130187 and telephone conversations with representatives from applicant organizations.

All seven organizations that applied for participation in the 2013 Joint Fundraising Drive were in compliance with the criteria established by the Board of Supervisors as delineated in the Administrative Code Section 16.93-2. This year a new federation, Asian Pacific Fund, applied and met the criteria. We understand that all Asian Pacific Fund has discussed with the other federations how all the new organizations will be incorporated into the Combined Charity Drive.

**CRITERIA**

Following is a list of the criteria established by the Board of Supervisors and information as to how the applicants met each requirement. All agencies must satisfy subsections (a) through (e).

**Criterion A:** Be a federated agency representing ten (10) or more charitable organizations of which 50 percent shall represent organizations located in the counties of San Francisco, San Mateo, Santa Clara, Alameda, Contra Costa and Marin.

According to the City Attorney, "located in the counties" may be defined as having offices, fundraising or otherwise doing business in those counties:

1. Asian Pacific Fund

Asian Pacific Fund represents over 75 organizations, all of which are located in the Bay Area counties.

2. Bay Area Black United Fund, Inc.

Bay Area Black United Fund, Inc. represents 50 agencies, all of which are located in the Bay Area counties.

3. Community Health Charities

Community Health Charities represents more than 40 charitable agencies with 50 percent or more of the agencies located in the Bay Area counties.

4. EarthShare of California (Environmental Federation of California)

Earth Share of California represents more than 70 agencies, with 50 percent or more of the agencies located in the Bay Area counties.

5. Global Impact

Global Impact represents more than 45 agencies of which 50 percent or more are located in the Bay Area counties.

6. Local Independent Charities (LIC)

Local Independent Charities represents over 200 agencies of which 50 percent or more are located in the Bay Area counties.

7. United Way of the Bay Area

United Way of the Bay Area represents over 200 agencies, of which 50 percent or more are located in the Bay Area counties.

Criterion B: The federated agency must certify to the Board of Supervisors that the Federal Internal Revenue Service has determined that contributions to all of the represented charitable organizations are tax deductible.

Each of the applicant organizations included a determination letter from the Internal Revenue Service indicating proof of their tax-deductible status.

Criterion C: The federated agency must have been in existence with 10 or more qualified charities for at least one year prior to the date of application and provide satisfactory evidence to that effect at the time of filing an application with the Board.

This criterion was met by all agencies.

Criterion D: The federated agency must submit its most recent certified audit at the time of filing an application with the Board.

The applicant agencies provided these documents, as detailed below:

1. Asian Pacific Fund submitted Financial Statements and an Independent Auditor's Report for the period ending June 30, 2011 dated October 30, 2012.
2. Bay Area Black United Fund, Inc. submitted Audited Financial Statements as of June 30, 2012 with an Independent Auditors' Report by Grant & Smith, LLP, dated September 18, 2012.
3. Community Health Charities of California submitted Financial Statements dated June 30, 2011, and an Independent Auditors' Report by Stroub & Company, CPAs dated October 18, 2012.
4. EarthShare of California (Environmental Federation of California, Inc.) submitted Financial Statements for the years ending June 30, 2011 and 2010, with an Independent Auditors' Report by Bregante & Company, LLP, dated December 20, 2011.
5. Global Impact submitted Financial Statements and Supplemental Information for the years ended June 30, 2011 and 2012, with an Independent Auditors' Report by IBDO USA, LLP dated October 19, 2012.

6. Local Independent Charities submitted Financial Statements for the years ending April 30, 2012 and 2011, with an Independent Auditor's Report by Maze & Associates Accountancy Corporation, dated August 17, 2012.
7. United Way of the Bay Area submitted Financial Statements for years ending June 30, 2012 and 2011, with a Report of Independent Auditors by Moss Adams LLP, dated November 29, 2012.

Criterion E: Agencies that wish to participate in the Annual Drive are required to submit applications to the Board of Supervisors that include all information that may be relevant to the criteria listed in the Section.

All applicants provided documentation in their letters of application to the Board of Supervisors that they are in compliance with the requirements of Section 16.93-2. This constitutes "certification."

Therefore, all applicants were in compliance with Criterion E.

Attachment: Federation contacts for 2013 campaign

**Contacts for Federations CCSF 2013 Campaign (File 139187)**

Organization and address	Contact person, phone, fax, email
Asian Pacific Fund 465 California Street, Suite 809 San Francisco, CA 94104	Audrey Yamamoto President and Executive Director (415) 395-9985 (415) 986-2040 (F) audrey@asianpacificfund.org
Bay Area Black United Fund, Inc. (BABUF) 1212 Broadway, Suite 810 Oakland, CA 94612	Linda Dails Office Manager (510) 763-7270 (510) 763-1155 (F) ldails@babuf.org
Community Health Charities 2363 Boulevard Circle, Suite 105. Walnut Creek, CA 94595	Krystie Scull Executive Director (925) 947-5771 (925) 947-5772 (F) kscull@healthcharitiescal.org
EarthShare of California 49 Powell Street, Suite 510 San Francisco, CA 94102	Dave Coyle Associate Director (415) 981-1999 x 305 (415) 981-3773 (F) dave@earthshareca.org
Global Impact 66 Canal Center Plaza, Suite 310 Alexandria, VA 22314	Jim Hill (510) 332-4179 (510) 482-5646 (F) jhillco@juno.com
Local Independent Charities 1100 Larkspur Landing Circle, Suite 340 Larkspur, CA 94939	Michelle Clancy Campaign & Membership Services (415) 925-2600 (415) 925-2540 (F) mclancy@mcguireinc.com
United Way of the Bay Area 221 Main Street, Suite 300 San Francisco, CA 94105	Laura Marshall Development Officer 415-808-4345 TBD (F) lmarshall@uwba.org