

SUMMARY OF FINDINGS
2015 Review of Applications
To Participate in Annual Combined Charities Fundraising Drive

SUMMARY OF METHODOLOGY AND FINDINGS

Our review consisted of an examination of the materials provided in File No. 150216 and telephone conversations with representatives from applicant organizations.

All seven organizations that applied for participation in the 2015 Joint Fundraising Drive are in compliance with the criteria established by the Board of Supervisors as delineated in the Administrative Code Section 16.93-2.

CRITERIA

Following is a list of the criteria established by Ordinance and information as to how the applicants met each requirement. All agencies 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 40 organizations, with 50 percent or more of the agencies located in the Bay Area counties.

2. Bay Area Black United Fund, Inc.

Bay Area Black United Fund, Inc. represents more than 50 agencies with 50 percent or more of the agencies 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 75 agencies, with 50 percent or more of the agencies located in the Bay Area counties.

5. Global Impact

Global Impact represents more than 70 agencies of which 50 percent or more are located in the Bay Area counties.

6. Local Independent Charities (LIC)

Local Independent Charities represents over 375 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 225 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 information 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 an Independent Auditors Report and Audited Financial Statements and Supplementary Information dated December 17, 2014 performed by Burr Pilger Mayer, Inc.
2. Bay Area Black United Fund, Inc. submitted an Audited Financial Statement dated December 31, 2012, with an Independent Auditors' Report by Grant & Smith, LLP, dated September 9, 2014.
3. Community Health Charities of California submitted Financial Statements dated June 30, 2013, and an Independent Auditors' Report by Stroub & Company, CPAs dated December 24, 2013.

4. EarthShare of California (Environmental Federation of California, Inc.) submitted Financial Statements for the years ending June 30, 2013, with an Independent Auditors' Report by Bregante & Company, LLP, dated February 26, 2015.
5. Global Impact submitted Financial Statements and Supplemental Material for the years ended June 30, 2014 and 2013, with an Independent Auditors' Report by IBDO USA, LLP dated October 9, 2014.
6. Local Independent Charities submitted Financial Statements for the years ending April 30, 2013, with an Independent Auditor's Report by Maze & Associates Accountancy Corporation, dated August 19, 2013.
7. United Way of the Bay Area submitted Financial Statements for years ending June 30, 2014 and 2013, with a Report of Independent Auditors by Moss Adams LLP, dated November 5, 2014.

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 or confirmed by telephone 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 2015 campaign

Contacts for Federations CCSF 2015 Campaign (File 150216)

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) 800-6592 (F) dave@earthshareca.org
Global Impact 66 Canal Center Plaza, Suite 310 Alexandria, VA 23314	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	Gabriela Jimenez Development Officer (909) 489-4488 gjimenez@uwba.org