

SUMMARY OF FINDINGS
2018 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. 180213 and follow up conversations with representatives from some applicant organizations.

All seven organizations that applied for participation in the 2018 Joint Fundraising Drive are in compliance with the criteria established by the Mayor and Board of Supervisors in 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 City requirements.

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. Administrative Code Sec. 16.93-2(a) lists these counties as San Francisco, San Mateo, Santa Clara, Alameda, Contra Costa and Marin.

1. American’s Best Local Charities (formerly Local Independent Charities - LIC)

America’s Best Local Charities represents over 300 agencies of which 50 percent or more are located in the Bay Area counties.

2. Asian Pacific Fund

Asian Pacific Fund represents 34 organizations, all of which are located in the Bay Area counties.

3. Bay Area Black United Fund, Inc.

Bay Area Black United Fund, Inc. represents 54 agencies, all of which are located in the Bay Area counties.

4. Community Health Charities

Community Health Charities represents 55 charitable agencies, of which 50 percent or more are located in the Bay Area counties.

5. EarthShare of California (Environmental Federation of California)

Earth Share of California represents more than 65 agencies, of which 50 percent or more located in the Bay Area counties.

6. Global Impact

Global Impact represents 67 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 66 agencies, all of which 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. American's Best Local Charities (formerly Local Independent Charities) submitted Financial Statements for the year ended April 30, 2017, with an Independent Auditor's Report by Maze & Associates Accountancy Corporation, dated December 30, 2017.
2. Asian Pacific Fund submitted Financial Statements and Supplementary Information dated October 6, 2017 performed by BPM.
3. Bay Area Black United Fund, Inc. submitted a Financial Statement for the year ended December 31, 2015 and an Independent Auditors' Report performed by Christopher Chime Ogbato dated August 3, 2016.
4. Community Health Charities of California submitted Financial Statements and Supplementary Information for the years ended June 30, 2015 and 2014, and a Report of Independent Auditors by Cherry Bekaert dated October 20, 2016.
5. EarthShare of California (Environmental Federation of California, Inc.) submitted Financial Statements for the years ended June 30, 2016 and 2015 with an Independent Auditors' Report by Bregante & Company, LLP, dated July 21, 2017.

6. Global Impact submitted Financial Statements for the years ended June 30, 2017 and 2016, with an Independent Auditors' Report performed by Gelman, Rosenberg and Friedman dated February 8, 2018.
7. United Way of the Bay Area submitted a Report of Independent Auditors and Financial Statements for the years ending June 30, 2017 and 2016 dated November 7, 2017 performed by Moss Adams LLP.

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 or email 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 2018 campaign

Contacts for Federations CCSF 2018 Campaign

| Organization and address | Contact person, phone, email |
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| Asian Pacific Fund 465 California Street, Suite 809 San Francisco, CA 94104 | Audrey Yamamoto President and Executive Director (415) 395-9985 audrey@asianpacificfund.org |
| Bay Area Black United Fund, Inc. 1212 Broadway, Suite 810 Oakland, CA 94612 | Linda Dails Office Manager (510) 763-7270 ldails@babuf.org |
| Community Health Charities 2363 Boulevard Circle, Suite 105. Walnut Creek, CA 94595 | Krystie Scull Director, Business Development (925) 521.6522 Kscull@healthcharities.org |
| EarthShare of California 49 Powell Street, Suite 510 San Francisco, CA 94102 | Dave Coyle Associate Director (415) 981-1999 x 305 dave@earthshareca.org |
| Global Impact 66 Canal Center Plaza, Suite 310 Alexandria, VA 23314 | Carina Weyer Director, Campaign Engagement Western Region (206) 859-1170 carina.weyer@charity.org |
| Local Independent Charities 1100 Larkspur Landing Circle, Suite 340 Larkspur, CA 94939 | Michelle Clancy Campaign & Membership Services (415) 925-2600 mclancy@mcguireinc.com |
| United Way of the Bay Area 221 Main Street, Suite 300 San Francisco, CA 94105 | Stanislava Peycheva Workplace Engagement Officer (415) 808.4358 speycheva@uwba.org |