

SUMMARY OF FINDINGS
2019 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. 190280 and follow up conversations with representatives from some applicant organizations.

All six organizations that applied for participation in the 2019 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 380 agencies of which 50 percent or more are located in the Bay Area counties.

2. Asian Pacific Fund

Asian Pacific Fund represents 12 organizations, all of which are located in the Bay Area counties.

3. Community Health Charities

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

4. EarthShare of California (Environmental Federation of California)

Earth Share of California represents more than 60 agencies, of which 50 percent or more located in the Bay Area counties.

5. Global Impact

Global Impact represents over 60 agencies, of which 50 percent or more are located in the Bay Area counties.

6. United Way of the Bay Area

United Way of the Bay Area represents 32 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, 2018, an Independent Auditor's Report by Maze & Associates Accountancy Corporation, dated September 13, 2018.
2. Asian Pacific Fund submitted an Independent Auditor's Report dated August 31, 2018, and Financial Statements of Financial Position dated December 31, 2017 prepared by Squarmilner.
3. Community Health Charities of California submitted Financial Statements and Supplementary Information for the years ended June 30, 2018 and 2017, and a Report of Independent Auditors by Cherry Bekaert dated February 14, 2019.
4. 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.
5. Global Impact submitted Financial Statements for the years ended June 30, 2018 and 2017, with an Independent Auditors' Report performed by Gelman, Rosenberg and Freedman dated February 6, 2019.

6. United Way of the Bay Area submitted a Report of Independent Auditors dated November 29, 2018 and Financial Statements for the years ending June 30, 2018 and 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 2019 campaign

Contacts for Federations CCSF 2019 Campaign

Organization and address	Contact person, phone, email
<p>Asian Pacific Fund 465 California Street, Suite 809 San Francisco, CA 94104</p>	<p>Audrey Yamamoto President and Executive Director (415) 395-9985 audrey@asianpacificfund.org</p>
<p>Community Health Charities 2363 Boulevard Circle, Suite 105. Walnut Creek, CA 94595</p>	<p>Krystie Scull Director, Business Development (925) 521.6522 Kscull@healthcharities.org</p>
<p>EarthShare of California 49 Powell Street, Suite 510 San Francisco, CA 94102</p>	<p>Dave Coyle Associate Director (415) 981-1999 x 305 dave@earthshareca.org</p>
<p>Global Impact 66 Canal Center Plaza, Suite 310 Alexandria, VA 23314</p>	<p>Priti Derrick Director of Charity Services (703) 717-5232 charitypartnerships@charity.org</p>
<p>Local Independent Charities 1100 Larkspur Landing Circle, Suite 340 Larkspur, CA 94939</p>	<p>Michelle Clancy Campaign & Membership Services (415) 925-2600 mclancy@mcguireinc.com</p>
<p>United Way of the Bay Area 221 Main Street, Suite 300 San Francisco, CA 94105</p>	<p>Stanislava Peycheva Workplace Engagement Officer (415) 808.4358 speycheva@uwba.org</p>