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## **PROCEDURAL ITEMS FOR THE CMFA SUMMARY AND RECOMMENDATIONS**

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Items: A1, A2, A3

Action: Pursuant to the by-laws and procedures of CMFA, each meeting starts with the call to order and roll call (A1) and proceeds to a review and approval of the minutes from the prior meeting (A2). After the minutes have been reviewed and approved, time is set aside to allow for comments from the public (A3).

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## **VILLA PRIMAVERA APARTMENTS SUMMARY AND RECOMMENDATIONS**

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Applicant: Chelsea Investment Corporation

Action: Initial Resolution

Amount: \$10,000,000 (Not to Exceed)

Purpose: Finance Affordable Multi-Family Rental Housing Facility  
Located in the City of Calexico, Imperial County, California

Activity: Affordable Housing

Meeting: February 7, 2014

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### Background:

Chelsea Investment Corporation ("CIC") is a real estate company focused on the financing and development of affordable housing. CIC provides financial engineering, development, asset management and property management services, as well as legal and non-profit experience to its development and investment partners and clients. Considered experts in the affordable housing sector, CIC has a strong and experienced team of professionals who identify and implement timely and cost effective solutions to the many challenges of this market niche. The CMFA has facilitated over 10 CIC projects.

- Chelsea Investment Corporation has developed and financed over 6,300 affordable housing units at a cost of over \$1 billion. Included are inclusionary developments, rural developments and special needs housing.
- They have developed over 2,100 inclusionary units in San Diego, Chula Vista and Carlsbad, at a cost of over \$450,000,000.
- Their clients include Barratt American, Black Mountain Ranch, Brookfield Homes, Centex Homes, Comite de Bienestar, Lennar, McMillin Homes, Pardee Homes, Santaluz, Shea Homes and others.
- Their not-for-profit clients include: The Salvation Army, Senior Community Centers, St. Vincent de Paul Management, Housing Development Partners, Southern California Housing Collaborative and Colette's Children's Home.
- They have completed multiple projects on time, on budget and in complete satisfaction of their clients' affordable housing requirements.

### The Project:

The Villa Primavera Apartments project is a new construction project of a two-story, 48-unit affordable multifamily rental housing facility located at the corner on the South side of Meadow Drive, West of Meadows Road, Calexico, California. The units will be restricted to households between 25-60% of AMI. The project will offer a community kitchen, computer room, green area and outdoor recreational areas. The financing of this project will result in the creation of 48 affordable apartments for the next 55 years.

### The City of Calexico:

The City of Calexico is a member of the CMFA and will need to hold a TEFRA hearing. Upon closing, the City is expected to receive approximately \$6,250 as part of CMFA's sharing of Issuance Fees.

### Proposed Construction Financing:

#### Sources of Funds:

Tax-Exempt Bond:	\$ 10,000,000
Deferred Developer Fee:	\$ 340,000
Capital Contribution:	\$ 1,100,000
Total Sources:	\$ 11,440,000

#### Uses of Funds:

Land Acquisition:	\$ 800,000
New Construction:	\$ 6,500,000
Architectural & Engineering:	\$ 450,000
Legal, Professional:	\$ 200,000
Impact and Permit Fees:	\$ 800,000
Financing Costs & Reserves:	\$ 850,000
Contingencies & Other Soft Costs	\$ 502,500
Developer Fee:	\$ 1,300,000
Cost of Issuance:	\$ 37,500
Total Uses:	\$ 11,440,000

### Terms of Transaction:

Amount:	\$10,000,000 (not to exceed)
Maturity:	2 years
Collateral:	Deed of Trust on property
Bond Purchasers:	Private Placement
Estimated Closing:	September 2014

**Public Benefit:**

A total of 48 households will be able to enjoy high quality, independent, affordable housing in the City of Calexico. Amenities at the complex will include a common community kitchen, computer room, and an outdoor recreation area. The complex will offer health and wellness, as well as financial literacy services. The construction of this project will provide affordable living in the City of Calexico for 55 years.

Percent of Restricted Rental Units in the Project: 100%  
25% (12 Units) restricted to 30%-50% of area median income households; and  
73% (35 Units) restricted to 30%-60% of area median income households.  
Unit Mix: 1, 2, & 3 bedroom units  
Term of Restriction: 55 years

**Finance Team:**

Lender:	TBD
Bond Counsel:	Orrick, Herrington & Sutcliffe LLP
Issuer Counsel:	Jones Hall, APLC
Lender Counsel:	TBD
Borrower Counsel:	Odu & Associates

**Recommendation:**

The Executive Director recommends that the CMFA Board of Directors approve an Initial Resolution of \$10,000,000 for the Villa Primavera Apartments affordable housing project located in the City of Calexico, Imperial County, California.

Note: This transaction is subject to review and final approval at the Final Resolution.



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## **WESTRIDGE AT HILLTOP APARTMENTS SUMMARY AND RECOMMENDATIONS**

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**Applicant:** Menlo Capital Group LLC

**Action:** Initial Resolution

**Amount:** \$40,000,000 (Not to Exceed)

**Purpose:** Finance Affordable Multi-Family Rental Housing Facility  
Located in the City of Richmond, Contra Costa County,  
California

**Activity:** Affordable Housing

**Meeting:** February 7, 2014

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### Background:

Menlo Capital Group LLC is a private investment firm based in San Francisco and Los Angeles with investment platforms and operating companies in real estate, finance/banking, healthcare and alternative energy and manages assets across a variety of investment platforms and affiliate partnerships. The company manages propriety balance sheet capital, advises institutional capital organized as private equity funds, and is the manager of joint ventures with institutional capital partners for specific investment strategies. The company was founded in 1976 as a full service real estate development and investment firm and began its investment and operating activities outside of real estate in 2007.

Menlo has been an active investor and developer of real estate since 1976. Its real estate investment and operating units are organized through its affiliate Menlo Capital Management LLC. During its three decade tenure, Menlo and its affiliates have developed or acquired over 200 assets, representing in excess of 10 million square feet of commercial, residential, industrial, hospitality, retail, and mixed used projects all across the US.

Menlo has sponsored a variety of affiliate investment partnerships and joint ventures with institutional capital partners for the purposes of executing specific real estate investment programs primarily for the execution of acquisitions in the residential, hospitality, net lease and office sectors. Its affiliates include Hawkins Way Capital, a real estate opportunity fund that owns and manages over 2000 student housing beds nationally, Menlo Realty Income Acquisition Group LLC, a joint-venture partnership with the largest US net leased REIT, Realty Income

Corporation that owns over 1 million square feet of single tenant net leased assets in 21 states, and MK Menlo Acquisition Group LLC, a programmatic joint venture with a leading global private equity firm that manages in excess of \$8 billion in capital commitments. The joint venture owns and operates over 1 million square feet of pharmacy net leased assets nationally.

#### The Project:

The Westridge at Hilltop Apartments project is an acquisition rehabilitation project of a 401-unit affordable multifamily rental housing facility located at 2490 Lancaster Drive, Richmond, California. This apartment community is comprised of 13 one- and two-story buildings, which includes an onsite leasing office and fitness center, situated on 11 acres of beautifully landscaped apartment homes overlooking the San Pablo Bay. The project will include 180 studio units, 220 1-br units and 1 managers unit. The units will be restricted to households between 50-60% of AMI. The financing of this project will result in the continuation of 401 affordable apartments for the next 55 years.

#### The City of Richmond:

The City of Richmond is a member of the CMFA and held a TEFRA hearing on July 16, 2013. Upon closing, the City is expected to receive approximately \$15,833 as part of CMFA's sharing of Issuance Fees.

#### Proposed Construction Financing:

##### Sources of Funds:

Tax-Exempt Bond:	\$ 35,000,000
Deferred Developer Fee:	\$ 750,000
Developers Equity:	<u>\$ 17,100,000</u>
Total Sources:	\$ 52,850,000

##### Uses of Funds:

Land Acquisition:	\$ 4,000,000
Building Acquisition:	\$ 36,000,000
Rehabilitation:	\$ 8,208,000
New Machinery & Equipment:	\$ 100,000
Architectural & Engineering:	\$ 90,000
Legal & Professional:	\$ 180,000
Contingencies & Other Soft Costs	\$ 65,000
Construction Financing, Interest, Relocation:	\$ 1,204,000
Permanent Financing:	\$ 178,000
Developer Fee:	\$ 2,500,000
Cost of Issuance:	<u>\$ 325,000</u>
Total Uses:	\$ 52,850,000

Terms of Transaction:

Amount:	\$40,000,000 (not to exceed)
Maturity:	17 years
Collateral:	Deed of Trust on property
Bond Purchasers:	Private Placement
Estimated Closing:	September 2014

Public Benefit:

A total of 400 households will continue to be able to enjoy high quality, independent, affordable housing in the City of Richmond. Amenities at the complex will include a common community kitchen, computer room. The project will continue to provide affordable living in the City of Richmond for 55 years.

Percent of Restricted Rental Units in the Project: 100%  
30% (120 Units) restricted to 50% of area median income households; and  
70% (280 Units) restricted to 60% of area median income households.  
Unit Mix: Studio & 1 bedroom units  
Term of Restriction: 55 years

Finance Team:

Lender:	Goldman, Sachs & Co.
Bond Counsel:	Orrick, Herrington & Sutcliffe LLP
Issuer Counsel:	Jones Hall, APLC
Lender Counsel:	TBD
Borrower Counsel:	Hobson Bernardino & Davis LLP

Recommendation:

The Executive Director recommends that the CMFA Board of Directors approve an Initial Resolution of \$40,000,000 for the Westridge at Hilltop Apartments affordable housing project located in the City of Richmond, Contra Costa County, California.

Note: This transaction is subject to review and final approval at the Final Resolution.



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## **OAK CREEK TERRACE APARTMENT SUMMARY AND RECOMMENDATIONS**

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**Applicant:** Napa Valley Community Housing

**Action:** Revised Resolution

**Amount:** \$12,000,000 (Not to Exceed)

**Purpose:** Finance Affordable Multi-Family Rental Housing Facility  
Located in the City of Napa, Napa County, California

**Activity:** Affordable Housing

**Meeting:** February 7, 2014

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**Background:**

Napa Valley Community Housing's ("NVCH") Mission statement is "we respond to the unique housing needs of low and moderate income residents in Napa County. Napa Valley Community Housing builds preserves and manages Napa County's affordable housing stock. They provide opportunities for residents to grow succeed and improve the quality of their lives as they participate in the community".

Napa Valley Community Housing came into being as the result of a merger between two local housing non-profits: Housing Association for Napa Development and Napa Valley Family Homes. In combination, these "parent" agencies bequeathed to NVCH over thirty years of experience and accomplishments in the field of low income housing.

Since 1990 NVCH has built, alone or in partnership with others, over 600 new apartments and rental homes and, in addition has supervised the rehabilitation of more than 200 additional units. The agency currently has over 100 rental units in the pre-development or construction stages. As the County's primary affordable housing manager, it manages 575 housing units. The agency's total real estate portfolio is valued at over 50 million dollars, invested in a total of 23 properties throughout the County.

This is the second transaction that the CMFA has participated with NVCH.



### The Project:

The Oak Creek Terrace Apartments is a new construction project of a 41-unit affordable multifamily rental housing facility located in the City of Napa, California. The project will consist of two apartment buildings on a 1.77 acre parcel. The units are restricted to households between 60% and less of AMI. The financing of this project will result in the creation of 41 affordable apartments for the next 55 years.

The Oak Creek Terrace Apartments was originally induced in December 2010 but now needs an increase to the amount induced.

### The City of Napa:

The City of Napa is already a member of the CMFA and will need to hold a TEFRA hearing. Upon closing, the City is expected to receive approximately \$7,500 as part of CMFA's sharing of Issuance Fees.

### Proposed Construction Financing:

#### Sources of Funds:

Tax-Exempt Bond:	\$ 10,200,000
HOME:	\$ 3,000,000
Local:	<u>\$ 1,800,000</u>
Total Sources:	\$ 15,000,000

#### Uses of Funds:

Land Acquisition:	\$ 850,000
New Construction:	\$ 11,000,000
Architectural & Engineering:	\$ 500,000
Legal, Professional:	\$ 2,630,000
Cost of Issuance:	<u>\$ 20,000</u>
Total Uses:	\$ 15,000,000

### Terms of Transaction:

Amount:	\$12,000,000 (not to exceed)
Maturity:	30 years
Collateral:	Deed of Trust on property
Bond Purchasers:	Private Placement
Estimated Closing:	August 2014

### Public Benefit:

A total of 41 households will now be able to enjoy high quality, independent, affordable housing in the City of Napa. Amenities at the complex will include on-site parking, laundry facilities, air conditioning, picnic areas and children's play areas. After school programs, financial literacy

programs, and farm workers assistance services will also be offered. The construction of this project will provide affordable living in the City of Napa for 55 years.

Percent of Restricted Rental Units in the Project: 100%  
48% (20 Units) restricted to 50% or less of area median income households; and  
52% (21 Units) restricted to 60% or less of area median income households.  
Unit Mix: 1, 2, and 3 bedroom units  
Term of Restriction: 55 years

Finance Team:

Lender:	TBD
Bond Counsel:	Jones Hall, APLC
Issuer Counsel:	Jones Hall, APLC
Lender Counsel:	TBD
Borrower Counsel:	Gubb & Barshay LLP
Financial Advisor:	California Housing Partnership Corporation

Recommendation:

The Executive Director recommends that the CMFA Board of Directors approve a Revised Resolution of \$12,000,000 for the Oak Creek Terrace Apartments affordable housing project located in the City of Napa, Napa County, California.

Note: This transaction is subject to review and final approval at the Final Resolution.



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## **VILLA SOLIMAR & CYPRESS COURT APARTMENTS SUMMARY AND RECOMMENDATIONS**

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**Applicant:** Cabrillo Economic Development Corporation

**Action:** Final Resolution

**Amount:** \$4,500,000

**Purpose:** Finance Affordable Multi-Family Rental Housing Facility  
Located in the City of Oxnard, Ventura County, California

**Activity:** Affordable Housing

**Meeting:** February 7, 2014

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### Background:

In 1975, farm worker families living in substandard housing conditions in Cabrillo Village (Saticoy, CA) received eviction notices from the labor camp's grower-owners. Resisting the razing of their homes, 80 farm worker families raised money to purchase the land, started the Cabrillo Improvement Association (CIA), and became the land's legal owners on Cinco de Mayo 1976.

Over the next five years, the CIA rehabbed 80 homes, developed two new housing complexes totaling 79 units, started three new business ventures to expand the neighborhood's economic base, and provided social services to farm worker families. In 1981, in a decision to expand past its original borders, a countywide community development corporation was formed that became CEDC.

Since these humble beginnings, CEDC has built more than 1,000 units of affordable for-sale and multi-family rental housing, manages 440 affordable rental units, and has counseled more than 1,800 households preparing to purchase a home. In addition, CEDC has helped 275 families into homeownership through education, counseling, and lending services.

CEDC is now the leading non-profit affordable housing producer in Ventura County.

### The Project:

The Villa Solimar and Cypress Court projects are an acquisition rehabilitation of two existing multifamily complexes with a total of 35 apartments. They are two separate sites located in the City of Oxnard, in Ventura County, California. The Villa Solimar Apartments targets general occupancy households at 50 percent of AMI, and consists of 32 three-bedroom units in townhome style buildings. The Cypress Court complex targets individuals with a mental illness at 50 to 60 percent of AMI, and consists of two duplex units; 2 one-bedroom units and 2 two-bedroom units. Both sites are within close proximity of public transportation, retail, recreational parks and public schools. The scope of the rehabilitation for both sites consists of exterior and interior painting, flooring, kitchen upgrades including lighting, cabinets and countertops, parking lot paving, and energy efficiency improvements to the windows and HVAC system. The financing of this project will result in the creation of 35 affordable apartments for the next 55 years.

### The City of Oxnard:

The City of Oxnard is a member of the CMFA and held a TEFRA hearing on June 11, 2013. Upon closing, the City is expected to receive approximately \$2,812 as part of CMFA's sharing of Issuance Fees.

### Proposed Financing:

Sources of Funds:	<u>Construction</u>	<u>Permanent</u>
Tax-Exempt Bond:	\$ 4,500,000	\$ 2,290,000
LIH Tax Credit Equity:	\$ 229,000	\$ 2,285,060
Other:	<u>\$ 3,252,548</u>	<u>\$ 3,406,488</u>
Total Sources:	\$ 7,981,548	\$ 7,981,548

Uses of Funds:	
Acquisition/Land Purchase:	\$ 4,441,768
On & Off Site Costs:	\$ 126,615
Hard Construction Costs:	\$ 927,565
Architectural & Engineering:	\$ 85,000
Contractor Overhead & Profit:	\$ 63,251
Developer Fee:	\$ 858,100
Relocation:	\$ 117,092
Cost of Issuance:	\$ 212,300
Capitalized Interest:	\$ 99,580
Other Soft Costs (Marketing, etc.):	<u>\$ 1,050,277</u>
Total Uses:	\$ 7,981,548

### Terms of Transaction:

Amount:	\$4,500,000
Maturity:	17 years
Collateral:	Deed of Trust on property.
Bond Purchasers:	Private Placement.
Estimated Closing:	February 2014

Public Benefit:

A total of 35 families will continue to be able to enjoy high quality, independent, affordable housing in the City of Oxnard. Services at the complex will include a community room, on-site manager and tot lot for the families.

Percent of Restricted Rental Units in the Project: 100%  
31% (11 Units) restricted to 50% or less of area median income households and  
69% (24 Units) restricted to 60% or less of area median income households.  
Unit Mix: One-, two- and three-bedroom  
Term of Restriction: 55 years

Finance Team:

Lender:	Wells Fargo Bank, N.A
Bond Counsel:	Quint & Thimmig LLP
Issuer Counsel:	Jones Hall, APLC
Lender Counsel:	Sheppard Mullin, Richter & Hampton LLP
Borrower Counsel:	Goldfarb & Lipman LLP
Financial Advisor:	California Housing Partnership Corporation

Recommendation:

The Executive Director recommends that the CMFA Board of Directors approve a Final Resolution of \$4,500,000 for the Villa Solimar & Cypress Court Apartments affordable multi-family housing project located in the City of Oxnard, Ventura County, California.



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## **LAS BRISAS MOBILE HOME PARK SUMMARY AND RECOMMENDATIONS**

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Applicant:	Villa Del Arroyo Moorpark, LLC/ Augusta Communities
Action:	Final Resolution
Amount:	\$13,000,000
Purpose:	Finance the Acquisition, Improvement, Renovation and Equipping of a Mobile Home Park Located in the City of Long Beach, Los Angeles County, California
Activity:	Affordable Housing (Mobile Home Park)
Meeting:	February 7, 2014

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### **Background:**

Augusta Communities is a non-profit housing organization that was founded in 1998 to provide affordable housing opportunities for households of modest means through the acquisition, rehabilitation or preservation of existing mobilehome park communities.

Unlike for-profit owners, Augusta Communities does not make rent, maintenance, capital improvement or other ownership decisions based on optimizing profits. They make these decisions based on how they can make their communities cleaner, safer and more enjoyable places to live, while keeping their focus on affordability.

Augusta Communities is particularly sensitive to the impact rent increases can have on the homeowners living in our mobilehome parks. In their parks, rent increases are often lower than permitted under local rent control ordinances. They also offer rent subsidies to qualified households because protecting residents from large or unanticipated rent increases is important.

Villa Del Arroyo Moorpark, LLC will be the single purpose entity for the Las Brisas Mobile Home Park.

### **The Project:**

The Borrower will use the proceeds of the Loan to (i) finance the acquisition and improvement of the Las Brisas Mobile Home Park located in the City of Long Beach, California and (ii) make deposits to various Accounts and Funds established under the Indenture. Specifically, the

proceeds of the Bonds will be used to make deposits to the Project Fund, the Costs of Issuance Fund, the Restricted Account of the Replacement Reserve Fund and the Debt Service Reserve Fund.

Las Brisas Mobile Home Park is located at 400 E. Arbor Street, in Long Beach. The property consists of two parcels of residential land on the eastern end of Arbor Street. It consists of 96 mobile home Spaces. Two spaces are vacant. The Project includes interior streets with all utilities available to each space. Park site improvements include a park office, a restroom, laundry room, and an outdoor pavilion. Resident parking is provided on the street near each space and in the parking lot. The Project is centrally located with easy freeway access and walking distance to shopping and school.

#### The City of Long Beach:

The City of Long Beach is a member of the CMFA and held a TEFRA hearing on January 14, 2014. Upon closing, the City is expected to receive approximately \$8,125 as part of CMFA's sharing of Issuance Fees.

#### Proposed Financing:

##### Sources of Funds:

Tax-Exempt Bond:	\$ 11,670,000
Taxable Bond Proceeds:	<u>\$ 355,000</u>
Total Sources:	\$ 12,025,000

##### Uses of Funds:

Acquisition:	\$ 10,010,000
Original Issue Discount:	\$ 99,144
Underwriters Discount:	\$ 240,500
Debt Reserve Fund:	\$ 825,167
Repair & Replacement Fund:	\$ 500,000
Working Capital:	\$ 35,000
Cost of Issuance:	<u>\$ 315,189</u>
Total Uses:	\$ 12,025,000

#### Terms of Transaction:

Amount:	\$13,000,000
Rate:	Fixed
Maturity:	2049
Collateral:	Deeds of Trust on property
Bond Purchasers:	Institutional & Retail
Estimated Closing:	February 2014
Expected Rating:	BBB-

Public Benefit:

Financing allows the residents to continue to enjoy affordable rents.

Las Brisas Mobile Home Park:

Percent of Restricted Rental Pads in the Project: 20%

20% (19 of 95 total spaces) restricted to 50% or less of area median income household

Finance Team:

Underwriter:	Newcomb Williams Financial Group Securities offered through Stinson Securities, LLC
Bond/ Disclosure Counsel:	Ballard Spahr, LLP
Issuer Counsel:	Jones Hall, APLC
Borrower Counsel:	Goldfarb & Lipman LLP
Trustee:	U.S. Bank National Association
Trustee Counsel:	Dorsey & Whitney LLP
Rating Agency:	Standard & Poor's
Oversight Agent:	Wolf & Company Inc.

Recommendation:

The Executive Director recommends that the CMFA Board of Directors approve a Final Resolution of \$13,000,000 for the Las Brisas Mobile Home Park project located in the City of Long Beach, Los Angeles County, California





## **Professional Services Retention and Performance Review Policy**

The California Municipal Finance Authority (the “CMFA”) is a joint power authority organized under California Government Code Section 6500, and following (the “JPA Act”). Under the JPA Act, the CMFA is authorized to retain providers of certain professional services; the CMFA is not subject to any state or federal procurement or competitive bidding requirements for the selection of a service provider.

Each service provider to the CMFA shall be selected and engaged after the Board deliberates over the specific need or needs of the CMFA and determines whether such provider satisfies the requirements as identified by the Board. Such deliberation shall include (but is not limited to) a review for the potential of any conflict of interest with the CMFA or the Board of the CMFA. The process of identifying and selecting each service provider may be completed through a request for proposal, solicitation for a competitive proposal, a sole-source request proposal or such other method of selection as determined and directed by the Board.

The engagement of a financial advisor to perform the certain services, including but not limited to the functions of staff to the CMFA, will be subject to a Request for Proposal (“RFP”) every three years. The Executive Director will annually review the contract of the Financial Advisor Services Provider.

With respect to any engagement for professional services with the duration of at least one (1) year, the Board shall conduct a review on a periodic basis to assess and evaluate the performance of the service provider. Such review and assessment shall be conducted at least annually, but may be undertaken more frequently on an “as-needed” basis. The Board may also deliver any performance feedback on an “as-needed” basis. If permitted to terminate an engagement prior to its stated terms, such termination may be based upon the findings and determinations of the performance review.

As part of the periodic review and assessment of a service provider, the Board may evaluate the competitiveness of the fees and expenses charged for such services delivered. The Board may also review whether the fees are commensurate with the service and value provided to the CMFA and shall ensure that public funds are expended for measurable, competitively-priced goods and services for all contractors. With respect to any engagement for professional services with the duration of at least three (3) years, such evaluation shall occur at least once every three (3) years by the Board. Based upon the evaluations, the Board may take appropriate actions including the amending of certain terms of an engagement or early termination of such engagement for professional services.

With respect to any financing team formed by an applicant / borrower relating to any bond transaction to be completed through the CMFA, the Board retains the right to approve each participant to any transaction. In addition, the Board relies upon the provisions of its Procedures Guide including the following:

“The Authority developed this Procedures Guide to support its customer-oriented approach to debt financing. For example, it is the Authority’s current policy to give borrowers discretion in assembling their financing team, although the Authority requires bond counsel to recognize the Authority as its client.”

The Board may delegate to a subcommittee of less than a majority of its members such aspects of the review, selection or assessment process as it deems necessary or advisable in implementing this policy; provided, however, all final actions pursuant to this policy shall be made by the Board.

Policy Date: May 17, 2013



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## Current 2013-2014 Board Positions

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### **CMFA**

Deborah A. Moreno -	Chairperson
Justin McCarthy -	Vice Chairperson and Assistant Treasurer
Gordon J. Lee -	Treasurer
Faye K. Watanabe -	Secretary
Paula Connors-	Director

### **CFSC**

Justin McCarthy -	Chairperson and Assistant Treasurer
Faye K. Watanabe -	Vice Chairperson
Gordon J. Lee -	Treasurer, Secretary
Paula Connors -	Director
Deborah A. Moreno-	Director

### **Subcommittees:**

Audit Subcommittee:	Deborah Moreno and Faye Watanabe
BSA Subcommittee:	Gordon Lee and Deborah Moreno
Finance Subcommittee:	Faye Watanabe and Deborah Moreno
Professional Services Subcommittee:	Gordon Lee and Justin McCarthy.

# CALIFORNIA COUNCIL FOR AFFORDABLE HOUSING

## 2014

### MEMBERSHIP APPLICATION

Provides reduced rates for attendance at all conferences, policy meetings, and occupancy courses. Full Member receives all informational mailings—including newsletters, notices for all upcoming events, urgent Memoranda and Letters regarding legislation, etc. Full Member also receives voting rights at two Annual General Meetings and reduced rates for vendor's tables at conferences.

#### **ANNUAL DUES: \$600**

Please complete the following and mail this form and your check for this year's dues, payable to CALIFORNIA COUNCIL FOR AFFORDABLE HOUSING, at the address below.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail address: \_\_\_\_\_

☐ Renewal

☐ New member

I am joining the CALIFORNIA COUNCIL FOR AFFORDABLE  
HOUSING at the suggestion of: \_\_\_\_\_

#### **CALIFORNIA COUNCIL FOR AFFORDABLE HOUSING**

**1006 Fourth Street, Sixth Floor  
Sacramento, CA 95814**

**Phone: (916) 444-0286**

**Fax: (916) 444-3408**

**E-Mail Address: [ccah@mgci.com](mailto:ccah@mgci.com)**

**[www.californiacouncil.com](http://www.californiacouncil.com)**

**Contact: Alison Lee**

**National Sponsors****Renew CDFA Membership**

To renew your CDFA membership, fill out the membership renewal form below. Include your invoice number and membership dues that were sent via email. For assistance or more information, contact [CDFA](http://www.cdfa.net) at 614-224-1300.

**Lead Member**

Prefix	<input type="text"/>
* First Name	<input type="text"/>
* Last Name	<input type="text"/>
Suffix	<input type="text"/>
* Email Address	<input type="text"/>
* Title	<input type="text"/>
* Organization	<input type="text"/>
Department	<input type="text"/>
* Address	<input type="text"/>
Address 2	<input type="text"/>
* City	<input type="text"/>
* State	<input type="text"/>
* Zip Code	<input type="text"/>
* Country	<input type="text" value="United States"/>
* Office Phone Number	<input type="text"/>
Mobile Phone Number	<input type="text"/>
Fax Number	<input type="text"/>
* Web Site	<input type="text"/>
Assistant Name	<input type="text"/>
Assistant Email	<input type="text"/>

**Invoice Number**   
**Membership Total \$**

Payment Method

☒ Credit Card

Credit Card Type

▼

Exp Date

Credit Card #

Card Verification Code

Cardholder Name

Continue

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## The United Voice for Affordable Housing

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Membership &amp; Underwriters

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## Membership :: Membership &amp; Underwriters

## 2014 MEMBERSHIP DUES SCHEDULE

## Underwriting Levels:

President's Circle — \$25,000 Annual Support  
 Golden Sponsor — \$15,000 Annual Support  
 Silver Sponsor — \$10,000 Annual Support  
 CHC Patron — \$5,000 Annual Support

<b>Standard: *Full Membership:</b> \$2,500 Basic Membership: \$1,000*non-profit and for-profit organizations with annual revenues >\$500,000	<b>Small Organization or Government Entity:</b> **Full Membership: \$1,000 Basic Membership: \$500**non-profit and for-profit organizations with annual revenues <\$500,000
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**Full Membership** includes all Basic Membership benefits plus the ability to participate in policy roundtables, task forces, and committees, and to be eligible for consideration to become a member of the [Board of Directors](#) or [Board of Governors](#).

**Basic Membership** includes access to the monthly newsletter, policy updates and bulletins as they may be provided, and invitations to attend Lobby Day, the Hall of Fame luncheon and other special events as scheduled.

## 2014 UNDERWRITING PROGRAM SUMMARY

## President's Circle: Annual \$25,000 Donation

- Unlimited Memberships in CHC
- Four paid Registrations at CHC events, including forums, member assemblies
- Event Program recognition with 'President's Circle' status in all CHC publications
- Active link on [www.calhsng.org](http://www.calhsng.org), the premier site for up-to-date news in the affordable housing industry

## Golden Sponsor: Annual \$15,000 Donation

- Five paid Memberships in CHC
- Three paid Registrations at CHC events, including forums and member assemblies
- Event Program recognition with 'Golden Sponsor' status in all CHC publications
- Active link on [www.calhsng.org](http://www.calhsng.org), the premier site for up-to-date news in the affordable housing industry

## Silver Sponsor: Annual \$10,000 Donation

- Three paid Memberships in CHC
- Two paid Registrations at CHC events, including forums and member assemblies
- Event Program recognition with 'Silver Sponsor' status in all CHC publications
- Active link on [www.calhsng.org](http://www.calhsng.org), the premier site for up-to-date news in the affordable housing industry

## CHC Patron: Annual \$5,000 Donation

- Two paid Memberships in CHC
- One paid Registration at CHC events, including forums and member assemblies
- Event Program recognition with 'Patron' status in all CHC publications
- Active link on [www.calhsng.org](http://www.calhsng.org), the premier site for up-to-date news in the affordable housing industry

Join - CHC Membership

Newsletters

Upcoming Events

Become a CHC Member

[Online Application >](#)[Print Application >](#)

Thank you to our 2013 Underwriters

Foundation Members: \$30,000



Foundation Members: \$25,000



Foundation Members: \$20,000



Golden Sponsors: \$20,000



Please note that contributions are made to our 501(c)(3) entity and are tax-deductible.

If you would like to contribute by mail, please download our [Print Application](#) and make your check out to "California Housing Consortium" and send it to CHC at 30141 Agoura Road, Suite 205, Agoura Hills, CA 91301 to receive confirmation of your tax deduction.

## SILVER SPONSORS

Silver Sponsors:  
\$10,000



goldfarb lipman attorneys



SheppardMullin



CHC Patron Members:  
\$5,000







NIXON PEABODY



**California Housing Consortium :: The United Voice for Affordable Housing**

30141 Agoura Road, Suite 205 Agoura Hills, CA 91301

Tel: 818-735-9551 Fax: 818-735-7348 Email: [info@calhsng.org](mailto:info@calhsng.org)

400 Capitol Mall, Suite 900 Sacramento, CA 95814

Tel: 916-930-5248 Fax: 916-442-9130


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UA-394715-10

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(877) 282-9183 

[CSMFO](#)

# California Society of Municipal Finance Officers

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## New Member Signup

\* Required Fields

<b>-Step 1- Membership Type</b>	Step 2 Your Info	Step 3 Additional Info	Step 4 Cost Summary	Step 5 Payment
Membership Info				

-- New Member Signup --

**Organization:** Cal. Society of Muni. Finance Officers

**Member Dues: Annual:** (thru 31 Dec 2014)  
 Commercial (\$220.00)  
 Municipal (\$110.00)  
 OtherGov (\$50.00)  
 Education (\$20.00)

**Address:** CSMFO  
 1215 K Street, Suite 940  
 Sacramento, CA 95814

**Payment Methods:** Online Payment, Offline Payment

**Credit Cards:** -MasterCard -Visa

**Payment Types:** Online Credit Card, Mail a Check

## Introduction

Thank you for your interest in joining CSMFO. **This process is for NEW MEMBERS only!** Note that in order to qualify for a bulk Municipal member discount you MUST select your agency name from the drop down list and there must be at least three currently active members.

**If you join after September 30th, your membership will extend thru the following year.**

## Payment Notes

**This process is for NEW MEMBERS only! Existing Members need to pay their yearly Dues Notice by going to "Member Features", logging in, and selecting the "My Account" tab.**

CSMFO accepts online payment by Visa and Master Card. Make checks payable to CSMFO  
Mail checks to:  
CSMFO, 1215 K Street, Suite 940, Sacramento, CA 95814

### Refund Policy

If for some reason your application is not approved, you will receive a full refund. Once your application has been approved, no refunds are available.

### Membership Type (Please Choose One)

#### \* Choose Membership Type:

- Commercial: ☐ **Commercial Assoc. (\$220.00)** - Open to persons or corporations not currently employed by a government agency whose livelihood is derived principally from commercial or professional activities directly related to government finance.
- Municipal: ☐ **Municipal Member (\$110.00)** - Open to all public employees and elected or appointed officials presently having responsibility for, oversight of, or engaged in, the function of government finance in any city, special district or county in the State of California. (Note: If you are the fourth CSMFO Municipal Member (or higher) from your agency, you are entitled to a \$35 discount.)
- OtherGov: ☐ **Other Government (\$50.00)** - Open to government employees in the financial field who do not presently qualify for Municipal or Commercial membership but who are interested in the principles and practices of government finance. This may include finance professionals from state agencies, school districts, universities and representatives from other finance professional organizations such as GFOA.
- Education: ☐ **Student/Professor (\$20.00)** - Open to persons presently enrolled in or teaching finance, accounting or public administration studies.

<- Back

Next ->

^CLICK ONLY ONCE!^

- 1215 K Street Suite 940
- Sacramento, CA 95814

(877) 282-9183

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- © 1997-2012 CSMFO

## **GFOA Membership Fee Schedule**

The following GFOA membership fee schedule, as adopted by the Executive Board, takes effect April 1, 2009.\*

### **CITIES AND COUNTIES:**

Population	No. of Memberships included in Base Fee	Base Fee	Additional Memberships
0 – 4,999	1	\$ 160	\$150
5,000 – 9,999	1	170	150
10,000 – 19,999	1	190	150
20,000 – 29,999	1	225	150
30,000 – 39,999	2	250	150
40,000 – 49,999	2	305	150
50,000 – 74,999	3	595	150
75,000 – 99,999	3	640	150
100,000 – 199,999	4	840	150
200,000 – 299,999	5	1,145	150
300,000 – 499,999	5	1,305	150
500,000 – 749,999	6	1,775	150
750,000 – 999,999	6	3,050	150
More than 1,000,000	7	4,620	150

### **SPECIAL DISTRICTS:**

Number of Employees	No. of Memberships included in Base Fee	Base	Additional Memberships
0 – 99	1	\$ 160	\$150
100 – 499	1	280	150
500 – 999	2	500	150
1,000 – 4,999	3	700	150
5,000 – 9,999	4	885	150
10,000 – 19,999	5	1,080	150
20,000 – 29,999	6	1,295	150
More than 30,000	6	1,605	150

### **RETIREMENT SYSTEMS:**

Number of Members	No. of Memberships included in Base Fee	Base	Additional Memberships
0 – 4,999	1	\$ 160	\$150
5,000 – 9,999	1	270	150
10,000 – 24,999	2	420	150
25,000 – 49,999	2	540	150
50,000 – 99,999	3	770	150
100,000 – 249,999	4	1,205	150
More than 250,000	5	1,655	150

### **OTHER CATEGORIES:**

	Each Individual
State & Province: Population 0 – 1 Million	\$160
State & Province: Population 1– 5 Million	190
State & Province: Population 5 – 10 Million	225
State & Province: Population Over 10 Million	250
Federal	150
Associate	225
Inactive Retired	35
Educational	40

### **INTERNATIONAL:**

	Each Individual
Developed Country	\$210
Developing Country	160
Associate	250

\*\$35 of your membership dues pay for a subscription to Government Finance Review, GFOA's bimonthly magazine.

## HFMA Membership Dues - Reinstatement Application

### Membership Dues (through May 2015)

MONTH JOINED	DUES
December	\$ 471
January	\$ 455
February	\$ 433
March	\$ 417
April	\$ 396
May	\$ 376

Or pay through May 2014  
and be billed \$298 in June

MONTH JOINED	DUES
December	\$173
January	\$157
February	\$135
March	\$119
April	\$98
May	\$78

### Special Offers

25% MEMBER SAVINGS
<b>HFMA FORUMS<sup>°</sup></b>
Register today for the popular HFMA Forums now at a special price. Sign up for one or all four!
<b>REGISTER NOW \$83 PER FORUM</b>
<b>HFMA NEWSLETTERS<sup>°</sup></b>
Register today for HFMA Newsletters now at a special price. Sign up for one or all three!
<i>Healthcare Cost Containment</i> <b>\$ 90</b>
<i>Revenue Cycle Strategist</i> <b>\$ 98</b>
<i>Strategic Financial Planning</i> <b>\$125</b>

<sup>°</sup> You must sign up for an HFMA membership to get this discount. For Forum details, visit [hfma.org/forums](http://hfma.org/forums).  
For more information on Newsletters, visit [hfma.org/newsletters](http://hfma.org/newsletters).

## Membership Profile

Complete the member profile, making one selection from each of the organization, position and function areas that best describe your professional position.

### Organization\*

Select one code that best describes your work setting.

#### PROVIDER/PAYER SETTINGS

- ☐ Hospital or Medical Center
- ☐ Health System Headquarters/ Corporate Offices
- ☐ Ambulatory Care Clinic
- ☐ HMO, Health Plan, or Insurance Company
- ☐ Home Health Agency
- ☐ Medical Group or Specialty Practice
- ☐ Physician Practice Management Firm
- ☐ Skilled Nursing, Rehab, or Other Subacute Facility
- ☐ Third Party Administration
- ☐ Other Provider or Clinical Service (Lab, Imaging Center...)

#### OTHER SETTINGS

- ☐ Accounting Firm
- ☐ Collection and A/R Recovery Service
- ☐ Consulting Firm
- ☐ Law Firm
- ☐ GPO or Purchasing Alliance
- ☐ Professional or Trade Association or Publisher
- ☐ Educational Institution or Library
- ☐ Other Non Clinical/ Non Provider Setting

### Position Level\*

Select one code that indicates your level of responsibility.

- ☐ President, CEO, Executive Director, Administrator
- ☐ CFO/Controller
- ☐ Other Chief Officer NOT CFO or CEO (CCO, COO, CIO...)
- ☐ Vice President
- ☐ Assistant/Associate VP or Assistant/ Associate Administrator (NOT CFO)
- ☐ Director/Manager/Supervisor
- ☐ Staff Specialist or Professional (Analyst, Accountant, Consultant)
- ☐ Partner, Principal or Owner
- ☐ Clinical
- ☐ Attorney
- ☐ Other Level

### Function\*

Select one major functional area most relevant to your position.

- ☐ Accounting
- ☐ Administration or Operations
- ☐ Audit/Internal Audit
- ☐ Budget
- ☐ Business Development or Marketing
- ☐ Compliance
- ☐ Decision Support/Information Technology
- ☐ Finance
- ☐ Health Information (Medical Records)
- ☐ Managed Care
- ☐ Patient Access (Admitting, Registration...)
- ☐ PFS, Patient Billing and Collections
- ☐ Physician Practice Management
- ☐ Reimbursement-Government (Medicare/Medicaid)
- ☐ Reimbursement-Commercial (Managed Care)
- ☐ Reimbursement-General (Government and Commercial)
- ☐ Sales or Customer Service
- ☐ Utilization Review or Case Management
- ☐ Other Responsibility

\* required information

# HFMA Membership Reinstatement Application

## Personal Information

☐ Mr. ☐ Ms. ☐ Other

\* NAME

JOB TITLE

EMPLOYER

\*Preferred Mailing Address: ☐ HOME ☐ BUSINESS

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

ZIP

\* BUSINESS TELEPHONE

\* HOME TELEPHONE

MOBILE TELEPHONE

EMAIL

ALTERNATE EMAIL

Birth date / /

Date started in health care / /

Highest education level you have completed:

☐ HIGH SCHOOL ☐ SOME COLLEGE ☐ ASSOCIATE  
☐ BACHELOR ☐ MASTERS ☐ DOCTORATE

Date degree earned / /

HFMA is committed to diversity. Your response is voluntary.

☐ AMERICAN INDIAN/ALASKAN NATIVE  
☐ ASIAN OR PACIFIC ISLANDER  
☐ BLACK (NOT OF HISPANIC ORIGIN)  
☐ HISPANIC ☐ CAUCASIAN ☐ OTHER

☐ Exclude my name from the online HFMA Membership Directory.

☐ Exclude my name from lists provided to outside organizations.

## Affirmation

I affirm that the information I have given is true to the best of my knowledge, and I agree to abide by the HFMA Code of Ethics and the Constitution and Bylaws of the Association. To read the HFMA Code of Ethics go to [hfma.org/code](http://hfma.org/code).

SIGNATURE

DATE

## Membership Registration

Begin my membership the month of

Membership dues

\$

See table on the reverse of this page

## HFMA Forums / Newsletters 25% Off Offer (optional)

See table on the reverse of this page

☐ CFO FORUM (\$83)

\$

☐ LEGAL & REGULATORY FORUM (\$83)

\$

☐ PAYMENT & REIMBURSEMENT FORUM (\$83)

\$

☐ REVENUE CYCLE FORUM (\$83)

\$

☐ HEALTHCARE COST CONTAINMENT  
NEWSLETTER (\$90)

\$

☐ REVENUE CYCLE STRATEGIST  
NEWSLETTER (\$98)

\$

☐ STRATEGIC FINANCIAL PLANNING  
NEWSLETTER (\$125)

\$

Total (add all lines above)

\$

## Sponsor Information

You do not need a sponsor to become a member.

SPONSORING MEMBER NAME AND (IF KNOWN) ID#

## Chapter Affiliation

Please indicate your preferred chapter affiliation<sup>†</sup>.

To learn more about HFMA chapters, visit [hfma.org](http://hfma.org).

## Payment Method

☐ CHECK ENCLOSED

Credit Card:

☐ VISA ☐ MASTERCARD ☐ AMEX ☐ DISCOVER

CARD NUMBER

EXPIRATION DATE

CARDHOLDER'S NAME

CARDHOLDER'S SIGNATURE

<sup>†</sup>Note: If a new member does not provide a chapter affiliation, one will be assigned based on the location of their preferred mailing address. Upon application acceptance, members may request a chapter transfer by calling (800) 252-4362, ext. 2, or by sending an e-mail to [memberservices@hfma.org](mailto:memberservices@hfma.org). To learn more about the chapters in your area, visit [hfma.org](http://hfma.org).

Annual regular memberships include a \$30 allocation to *hfm*, the official magazine, which is not deductible from the dues. Annual dues cover membership in National HFMA and in one local chapter. Memberships are personal only and do not apply to institutions. Memberships, even those paid by employers, are not transferable.

\* required information - also additional fields to be completed on the reverse of this page.

Source Code: #13Mem3





# Membership Registration & Donation Form



Young Gabriel pets the resident cat at Mustard Seed School, which serves homeless children until they can transition back to public school.

Contact Name:
Organization:
Address:
City/State/Zip:
Phone: (     )
E-mail:
Website:

## MEMBERSHIP BENEFITS:

- ❖ Organizational members receive three (3) discounted registrations for Housing California's Annual Conference. Individual members who join/renew at the \$120 level or above are entitled to one discounted conference registration.
- ❖ Organizational and Individual members receive promotion on our website (unless otherwise requested).
- ❖ Organizational members can leverage our contacts in the state Capitol to invite legislators to tour their affordable developments, emergency shelter, service center, or organization.

## MEMBERSHIP LEVELS:

<b>ORGANIZATIONAL</b>	<input type="checkbox"/> New	<input type="checkbox"/> Renewal
<input type="checkbox"/> Nonprofit, Small	Less than \$500,000	\$350.00
<input type="checkbox"/> Nonprofit, Medium	Less than \$1 million	\$500.00
<input type="checkbox"/> Nonprofit, Large	\$1 million and above	\$750.00
<input type="checkbox"/> For-profit, Small	Less than 20 employees	\$650.00
<input type="checkbox"/> For-profit, Large	20 or more employees	\$950.00
<input type="checkbox"/> Government	Local, State, Federal	\$300.00

<b>INDIVIDUAL</b>	<input type="checkbox"/> New	<input type="checkbox"/> Renewal
<input type="checkbox"/> \$20.00		
<input type="checkbox"/> \$120.00		
<input type="checkbox"/> \$_____ Other		

## GENERAL DONATION:

For those who do **not** wish to become a member, or are already members, but wish to give an additional gift to support our work.

☐ **Donation or Additional Gift:** \$ \_\_\_\_\_

**TOTAL DUE:** \$ \_\_\_\_\_

## PAYMENT OPTIONS:

**CHECK:** Please mail check payment to: Housing California, 900 J Street, Second Floor, Sacramento, CA 95814

**CREDIT CARD:** *VISA or MasterCard Only.* For credit card payment, please complete this section and FAX this form to: 916.447.1900.

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ CSV (3-digit): \_\_\_\_\_

Billing Name: \_\_\_\_\_

Billing Address: \_\_\_\_\_

Cardholder Signature: \_\_\_\_\_

\_\_\_\_\_

**Questions?** Please contact Membership Coordinator Deborah Cosentino at [dcosentino@housingca.org](mailto:dcosentino@housingca.org) or 916.287.9881.

# Did You KNOW?

# THE Kennedy COMMISSION

Working for systemic change resulting in the production of housing for Orange County's extremely low income families.

- Orange County is among the top 10 least affordable metropolitan housing markets in the nation.
- 54% of households cannot afford the County's median priced home (\$437,100, 2010).
- The hourly wage necessary to rent an average two-bedroom apartment without exceeding the HUD-recommended 30% of income on housing is more than \$30.00.
- 56% of renters spend more than 30% of income on rent.
- A minimum wage worker has to work FOUR full-time jobs to afford an average two-bedroom apartment.

## What is the Kennedy Commission?

[www.kennedycommission.org](http://www.kennedycommission.org)

The Kennedy Commission is a non-profit collaborative of community members dedicated to developing solutions to Orange County, California's housing needs.

Our work has resulted in the production or approval of more than 3,500 affordable rental homes--homes that would not have been possible without the Commission's leadership.



Vineyard Town Homes, Anaheim



Woodbury, Irvine



Mendocino, San Clemente

**Affordable Communities in Orange County**



Through education, advocacy, policy development, and community collaboration, we strive to increase the housing opportunities for Orange County families earning less than \$20,000 annually.

We welcome the active participation of both those directly affected by the shortage of homes that people can afford and other interested community supporters.

## Please Help Us Achieve Our 2013 Membership Goals By Sending In Your Membership Dues Today

**Your membership is tax deductible.** The Kennedy Commission is a 501(c)(3) organization Tax ID #33-0959380

### Suggested Membership Levels:

#### Low-Income Individuals and Students

☐ \$25

#### Affordable Housing Professionals, Advocates, Activists

☐ \$50 ☐ \$75 ☐ \$100 ☐ \$150

#### Organizations with annual budgets under \$300,000

☐ \$250

#### Organizations with annual budgets over \$300,000

☐ \$1,000 ☐ \$3,000 ☐ \$5,000

#### Other

☐ \$ \_\_\_\_\_

Name \_\_\_\_\_

Organization (if any) \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ email \_\_\_\_\_

Please make check payable to **The Kennedy Commission**  
and mail to 17701 Cowan Avenue, Suite 200 Irvine, CA 92614


 Search Our Site

## THE VOICE OF AFFORDABLE HOUSING

- WHO WE ARE
- WHAT IS AFFORDABLE HOUSING?
- HOUSING POLICY & ADVOCACY
- PUBLICATIONS & PRESS ROOM
- EVENTS & TRAININGS
- MEMBERSHIP
- BENEFITS
- JOIN OR RENEW

### JOIN OR RENEW

Join or Renew Today! Here's how!

1. Find the membership level that has the [benefits](#) you seek.
2. Find your industry category and size. Click at the industry category you choose to join or renew today.

#### Non-Profit Organization - [Join or renew today >>](#)

Agency Size	Advocate	Professional	Partner
Small (less than \$500,000)	\$75	\$175	\$1,400
Medium (\$500,000 - \$1,000,000)	\$100	\$300	\$1,400
Large (\$1,000,000 +)	\$125	\$550	\$1,400

#### Government Agency - [Join or renew today >>](#)

[top of page](#)

Agency Size	Advocate	Professional	Partner
Small (3 or less people)	\$150	\$250	\$1,400
Large (4 or more people)	\$210	\$600	\$1,400

#### Private Corporation - [Join or renew today >>](#)

[top of page](#)

Agency Size	Advocate	Professional	Partner
Small (49 or less people)	\$200	\$400	\$1,600
Large (50 or more people)	\$300	\$600	\$1,600

#### Individual Membership - - [Join or renew today >>](#)

[top of page](#)

Agency Size	Professional Only Available at the Professional Level
Student / Senior / Low-Income	\$25

#### NEWS FROM NPH

[View All Calendar Details >>](#)

**February 6, 2014**  
**9:30 a.m. - 11:30 a.m.**  
[NPH Legislative Issues Working Group](#)

**February 6, 2014**

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#### MEMBERSHIP DIRECTORY

Available for download.

#### SEEKING AFFORDABLE HOUSING

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Supporter	\$75
Contributor	\$200

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## Government Agency

\$550

1



Add to cart

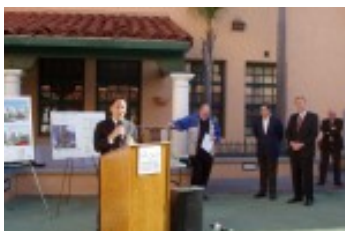
Category: [Membership](#).

### Description

#### Product Description

San Diego Housing Federation Member Benefits include: monthly newsletter, Housing and Community Development News, weekly one page email newsletter, email alerts regarding funding, new NOFAs and other urgent information, discounted registration to bi-monthly Affordable Housing Roundtables on informative topics, invitation to participate on Committees, discounted registration for Annual Awards Event honoring the best in the field, discounted registration for Annual Conference, Annual Membership Directory with brief description of your company, listing and link to your website on our website, access to Members Only Page on our website, and representation on public policy, coalition and public education initiatives.

#### Related Products





Developer Circle  
Membership

\$2,500

Add to cart



Developer Circle  
Membership

\$3,500

Add to cart

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Email   
Password   
☐ Remember me  
 [Forgot password](#)

Please select a level of membership below

#### Non-Profit Organization

*An organization that has a charitable or educational mission and is designated a non-profit by the Internal Revenue Service.*

[Small](#) ..... \$500  
(\$499,000 or Less)\*  
  
[Medium](#) ..... \$750  
(\$500,000-\$1,499,000)\*  
  
[Large](#) ..... \$1000  
(\$1,500,000-\$2,499,000)\*  
  
[Industry Leader](#) ..... \$1200  
(Above \$2,500,000)\*

#### Private Business, Lender or Investor

*An organization or corporation, whose primary mission is to earn a profit for its owner or share-holders.*

[Small Companies](#) ..... \$600  
(\$499,000 or Less)\*  
  
[Medium Companies](#) ..... \$850  
(\$500,000-\$1,499,000)\*  
  
[Large Companies](#) ..... \$1150  
(\$1,500,000-\$2,499,000)\*  
  
[Industry Leader](#) ..... \$1550  
(Above \$2,500,000)\*

#### Individual

*For one particular person, not an organization.*

[Regular](#) ..... \$150  
[Sustaining](#) ..... \$250  
[Student or low-income](#) ..... \$25

#### Government Agency

\$300

*An organized entity providing services to its citizens.*

**\*Last Year's Operating Revenue**

501 Shatto Place, Suite 403  
Los Angeles, CA. 90020  
(213) 480-1249 fax (213) 480-1788  
[www.scanph.org](http://www.scanph.org)

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**WOMEN IN PUBLIC FINANCE**  
NORTHERN CALIFORNIA CHAPTER

**WPF**  
**WOMEN IN PUBLIC FINANCE**  
**Northern California Chapter**

**MEMBERSHIP FORM**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Business Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

E-mail: \_\_\_\_\_ Other E-mail: \_\_\_\_\_

Phone: work: \_\_\_\_\_ Other: \_\_\_\_\_

Interests: \_\_\_\_\_

\_\_\_\_\_

WPF WOMEN IN PUBLIC FINANCE® is a registered trademark of Women in Public Finance and WPF WOMEN IN PUBLIC FINANCE, NORTHERN CALIFORNIA CHAPTER is a trademark of Women in Public Finance, Northern California Chapter and WOMEN IN PUBLIC FINANCE, NORTHERN CALIFORNIA CHAPTER is an independent organization separate and apart from the national organization.





**WOMEN IN PUBLIC FINANCE**  
NORTHERN CALIFORNIA CHAPTER

**WPF**  
**WOMEN IN PUBLIC FINANCE**  
**Northern California Chapter**

**Annual Dues**

**Membership Dues:** \$25.00

**Please make all checks payable to:** Women in Public Finance, Northern California Chapter

**Send check & form by 11/15/2012 to:** Esther Berg  
Director  
US Bancorp  
1 California Street, 10<sup>th</sup> floor  
San Francisco, CA 94110  
415.677.3688  
esther.berg@usbank.com

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## **PROCEDURAL ITEMS FOR THE CFSC SUMMARY AND RECOMMENDATIONS**

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Items: A1, A2, A3

Action: Pursuant to the by-laws and procedures of CFSC, each meeting starts with the call to order and roll call (A1) and proceeds to a review and approval of the minutes from the prior meeting (A2). After the minutes have been reviewed and approved, time is set aside to allow for comments from the public (A3).

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## Current 2013-2014 Board Positions

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### **CMFA**

Deborah A. Moreno -	Chairperson
Justin McCarthy -	Vice Chairperson and Assistant Treasurer
Gordon J. Lee -	Treasurer
Faye K. Watanabe -	Secretary
Paula Connors-	Director

### **CFSC**

Justin McCarthy -	Chairperson and Assistant Treasurer
Faye K. Watanabe -	Vice Chairperson
Gordon J. Lee -	Treasurer, Secretary
Paula Connors -	Director
Deborah A. Moreno-	Director

### **Subcommittees:**

Audit Subcommittee:	Deborah Moreno and Faye Watanabe
BSA Subcommittee:	Gordon Lee and Deborah Moreno
Finance Subcommittee:	Faye Watanabe and Deborah Moreno
Professional Services Subcommittee:	Gordon Lee and Justin McCarthy.

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## CHARITABLE GRANT GUIDELINES

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Recipient: Board Members of the California Foundation for  
Stronger Communities

Purpose: To Provide an Outline of Charitable Grant Guidelines

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### **CHARITABLE GUIDELINES:**

1. Ensure charitable donations are directed towards organizations that:  
Are in California communities.
  - a. Find it difficult to receive funding through other sources.
  - b. Have not received a charitable donation in the last year. This is not meant to include those organizations that have enjoyed a fee reduction through a CMFA financing.
  - c. Do not require compliance monitoring by the CMFA or CFSC.
  - d. Are not in a category listed below:
    - i. Individuals, including individual scholarship or fellowship assistance
    - ii. For-profit entities, including start-up businesses
    - iii. Political, labor, religious, or fraternal activities
    - iv. Endowments
    - v. Film or video projects, including documentaries
    - vi. Travel, including student trips or tours
    - vii. Promotional merchandise
    - viii. Organizations other than IRS 501(c)(3), 501(c)(6), governmental, or tribal entities
2. A staff report must be provided to the Board at least 24 hours before donations are recommended or approved. Funds will not be dispersed on a cash advance basis.
3. Coordinate donation with municipal staff, elected officials, recipient and press to ensure everyone on the team benefits from our partnership and unique give back. Furthermore, the widest dissemination of the donation will further the goals of the CMFA, and provide the greatest chance for leveraging these funds by inducing other donations.
4. Suggested categories the CMFA through the CFSC could direct funds are:
  - a. Health Care
  - b. Education
  - c. Human Services
  - d. Affordable Housing
  - e. Cultural
  - f. Targeted Populations: Youth, Seniors, Low/Moderate Income Individuals
5. Staff will distribute and process all charitable grants.

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AAPIP (Asian Americans/Pacific Islanders in Philanthropy)

211 Sutter Street, Suite 600

San Francisco , CA 94108

www.aapip.org

County San Francisco

FEIN

94-3150064

Founded: 1990

Previous Donation: ☐ Yes ☒ No

List Date 10/11/2013

**Mission:**

Founded in 1990, AAPIP (Asian Americans/Pacific Islanders in Philanthropy) is a national member-supported philanthropic advocacy organization dedicated to advancing philanthropy and Asian American/Pacific Islander (AAPI) communities. Our members include foundations, staff and trustees of grantmaking institutions, and nonprofit organizations in ten regional chapters across the United States. AAPIP engages communities and philanthropy to address unmet needs; serves as a resource for and about AAPI communities; supports and facilitates giving by and to AAPI communities; and incubates new ideas and approaches to building democratic philanthropy.

**Impact:**

A donation would assist in their continuing mission

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$280,800	11.9%	
Contributions	2,048,793	86.8%	
Other	<u>30,200</u>	<u>1.3%</u>	
Total Revenue:	<u>\$2,359,793</u>	<u>100.0%</u>	
Expenses:			
Program	\$2,527,074	86.0%	
Administration	411,685	14.0%	
Fund Raising			
Total Expenses:	<u>\$2,938,759</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$578,966)</u>		
Net Assets:	<u>\$2,364,502</u>		

BOD: N. Nina Ahmad; Jeff Kumataka; Liane Wong; Miki C. Akimoto; Jackie Liao; Lillian "Beadsie" Woo; June Noronha; Ryan Yamamoto; Alice Ito; June L. Jee; Suk Rhee; Kyung Yoon

Adonai  
8038 Rosebud Street  
Rancho Cucamonga , CA 91701  
adonaifamilies.org County San Bernardino

FEIN 56-2611932 Founded: 2008

Previous Donation: ☒ Yes ☐ No \$20,000 10/13/2009 List Date 11/22/2013

**Mission:**

To assist families who have a child with cancer. They provide school supplies and have Holiday parties for the parents and children who drive for miles to attend.

**Impact:**

A donation would assist them in the continuance of their mission.

**Financial Information:** IRS Form 990-EZ for FY 2012

Revenues:	Amount	%	Notes
Government/Earned			
Contributions	141,693	100.0%	
Other	16	0.0%	
Total Revenue:	<u>\$141,709</u>	<u>100.0%</u>	
Expenses:			
Program	\$123,174	93.3%	
Administration	8,055	6.1%	
Fund Raising	838	0.6%	
Total Expenses:	<u>\$132,067</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$9,642</u>		
Net Assets:	<u>\$31,124</u>		
BOD:	Pam Brown; Mark Brown; Deanna Hardy; JR Hofmann; Art Klementz; Dick Kelly; Ladd Hardy; Kent Tucker		

Age Well Senior Services  
24300 El Toro Road, Bldg A #2000  
Laguna Woods , CA 92637

www.agewellseniorservices.org

County

Orange

FEIN

93-1163563

Founded: 1975

Previous Donation: ☐ Yes ☒ No

List Date 11/1/2013

**Mission:**

To promote, advocate and improve the quality of life, dignity, and independence of the elderly. Services that enable seniors to stay in their own home and maintain "Quality of Life," is what we are all about.

Meals on wheels and Congregate Meals Programs  
Transportation  
South County Adult Day Services  
Health and Wellness Program  
Case Management  
Senior Centers

**Impact:**

A donation would assist the program to provide services to the elderly.

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$4,752,185	67.5%	
Contributions	2,129,046	30.2%	
Other	<u>156,966</u>	<u>2.2%</u>	
Total Revenue:	<u>\$7,038,197</u>	<u>100.0%</u>	
Expenses:			
Program	\$6,960,321	91.3%	
Administration	439,838	5.8%	
Fund Raising	<u>225,526</u>	<u>3.0%</u>	
Total Expenses:	<u>\$7,625,685</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$587,488)</u>		
Net Assets:	<u>\$1,847,343</u>		

BOD: Douglas E. Zielasko; Guy Navarro; Ted Sanders; Dan Dubois; Robert E. Bates; Howard Baumann; Anna T. Boyce; Tim Bryant; Mark Burton; Jim Cherrie; Ray Chicoine; Adam Darvish; Jolene Fuentes; Peter Gilkey; Patricia A. Kolstad; Kim Luu; Richard Morse; Steve Moyer; Tandy Sullivan; Ronald G. Ditty



# California Fairplay

PO Box 683

Rancho Murieta , CA 95683

norcalasthmacamp.org

County

Sacramento

FEIN

68-0478178

Founded: 2001

Previous Donation: ☐ Yes ☒ No

List Date 2/7/2014

## **Mission:**

All California FairPlay activities including the camp are supported by donations.

California FairPlay is based in Rancho Murieta, California and serves the greater Sacramento Region. California FairPlay Mission Statement: To provide needy children with clothing at no cost to them (including uniforms where needed) and to assist in fulfilling medical needs by developing programs and partnerships with individuals, community organizations and private businesses. This will build self-esteem and give needy children a better chance to succeed in school, which will develop good citizens.

Our Goals: To expose under-privileged children to educational events, field trips (including camping trips) and to award scholarships. To improve medical services to children. To raise funds by writing proposals for grants, seek donations and sponsoring events with no over-head charges to the organizations that California FairPlay helps.

## **Impact:**

Donations help pay for programmatic expenses and help more kids attend the camp.

## **Financial Information:**

From CA AG Website from Aug 14, 2013

Revenues:	Amount	%	Notes
Government/Earned			
Contributions	7,500	100.0%	
Other			
Total Revenue:	<u>\$7,500</u>	<u>100.0%</u>	
Expenses:			
Program	\$7,500	100.0%	
Administration			
Fund Raising			
Total Expenses:	<u>\$7,500</u>	<u>100.0%</u>	
Excess/(Deficit) of			
Revenues Over Expenses:			
Net Assets:	<u>\$350</u>		
BOD:	Alfred Brown, Sr.; Walter J. Edwards; Michael Allen; Tom Martucci; Alfred Brown, Jr.; Holly Butler; Agnes Norman		

Camino Nuevo Charter Academy - Temple Campus

3435 West Temple Street

Los Angeles , CA 90026

www.caminonuevo.org

County

Los Angeles

FEIN

95-4771789

Founded: 2000

Previous Donation: ☐ Yes ☒ No

List Date 11/22/2013

**Mission:**

The mission of Camino Nuevo Charter Academy is to educate students in a college preparatory program to be literate, critical thinkers and independent problem solvers who are agents of social justice with sensitivity toward the world around them.

**Impact:**

A donation would help to enhance the ongoing program

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$27,411,911	78.0%	
Contributions	6,697,042	19.1%	
Other	<u>1,034,999</u>	<u>2.9%</u>	
Total Revenue:	<u>\$35,143,952</u>	<u>100.0%</u>	
Expenses:			
Program	\$16,697,776	69.7%	
Administration	7,215,058	30.1%	
Fund Raising	<u>32,889</u>	<u>0.1%</u>	
Total Expenses:	<u>\$23,945,723</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$11,198,229</u>		
Net Assets:	<u>\$24,489,634</u>		

BOD: Mark Dalzell; Philip Lance; Shiho Ito; Elliot Ponchick; Alicia Maldonado;  
Cindy Lee Smet; Robert Ronus; Samar Bloomingdale; L. Michael Russell;  
Georgia Eisner; Bill Siart; Patti Phillips; Robert Kaplan

Campus Life Connection dba Collings Teen Center

1541 Merkley Avenue

West Sacramento , CA 95691

www.collingsteencenter.org

County

Yolo

FEIN

94-1707530

Founded: 1966

Previous Donation: ☐ Yes ☒ No

List Date 8/30/2013

**Mission:**

The Collings Teen Center is a DBA of Campus Life Connection, a faith-based 501(c)3 corporation serving the Sacramento region since 1992. Campus Life Connection is a branch of the global organization Youth For Christ, serving millions of youth nationally and worldwide since 1944.

Regionally, Campus Life has established a remarkable track record of caring for Sacramento youth in a wide diversity of ways. Some of Campus Life's programming is faith-oriented and some – like the everyday work of **the Collings Teen Center – is faith-neutral**. But all Campus Life staff and programming are dedicated to meeting the practical, educational, spiritual, and social needs of teens in the Sacramento region.

**Impact:**

A donation would contribute to the continuation of their mission in West Sacramento.

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$535,925	43.2%	
Contributions	704,817	56.8%	
Other	24	0.0%	
Total Revenue:	<u>\$1,240,766</u>	<u>100.0%</u>	
Expenses:			
Program	\$706,531	59.0%	
Administration	476,602	39.8%	
Fund Raising	<u>15,192</u>	<u>1.3%</u>	
Total Expenses:	<u>\$1,198,325</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$42,441</u>		
Net Assets:	<u>\$172,045</u>		
BOD:	Gary Fox; Stephen Scholz; Dr. Palmer Lee; Rick Kerr; David Busch; Ray Harrison; Henry Wells		

# ChildNet Youth and Family Services

4155 Outer Traffic Circle

Long Beach , CA 90804

www.childnet.net

County

Los Angeles

FEIN

95-2666942

Founded: 1972

Previous Donation: ☒ Yes ☐ No \$10,000 12/10/2010 List Date 11/22/2013

## **Mission:**

To provide safe homes, education and counseling to vulnerable children and families. The program philosophy reinforces personal responsibility and emphasizes the need for a strong family unit.

## **Impact:**

A donation would assist in enhancing the program

## **Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$21,497,412	97.7%	
Contributions	81,167	0.4%	
Other	<u>414,390</u>	<u>1.9%</u>	
Total Revenue:	<u>\$21,992,969</u>	<u>100.0%</u>	
Expenses:			
Program	\$20,491,787	86.5%	
Administration	3,184,666	13.4%	
Fund Raising	<u>14,887</u>	<u>0.1%</u>	
Total Expenses:	<u>\$23,691,340</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$1,698,371)</u>		
Net Assets:	<u>\$11,643,977</u>		

BOD: Don Trojan; Braden Phillips; Mike Deaderick; Louis Cassani; Robert Alperin; Geri Brewster; Gordon Lentzner; Jim Choura; Stephen Gordon; Randy Wilson; Tim Richmond

Clinicas de Salud Del Pueblo, Inc.

1166 K Street

Brawley , CA 92227

www.cdsdp.org

County

Imperial

FEIN

95-2657324

Founded: 1970

Previous Donation: ☒ Yes ☐ No \$15,000 12/10/2010 List Date 8/9/2013

**Mission:**

Clinicas de Salud del Pueblo is a private, non-profit corporation providing array of comprehensive primary care services to residents throughout Imperial and Riverside County. Established in 1970, Clinicas de Salud del Pueblo has expanded from two original clinics to nine clinics, three dental centers, and three Women, Infant and Children Nutrition Education Center and eight WIC voucher distribution sites. All clinics have bilingual and bicultural staff to assist patients. Clinicas de Salud del Pueblo is dedicated to providing excellent care, committed to contributing high level of customer service and promises to uphold services with uncompromising adherence to the highest standard of moral and ethical conduct.

**Impact:**

Donations will help expand facilities and programs.

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned	\$25,884,740	97.4%	
Contributions			
Other	<u>704,216</u>	<u>2.6%</u>	
Total Revenue:	<u>\$26,588,956</u>	<u>100.0%</u>	
Expenses:			
Program	\$19,119,315	67.4%	
Administration	9,238,954	32.6%	
Fund Raising			
Total Expenses:	<u>\$28,358,269</u>	<u>100.0%</u>	
Excess/(Deficit) of			
Revenues Over Expenses:	<u>(\$1,769,313)</u>		
Net Assets:	<u>\$2,383,618</u>		

BOD: Miguel C. Miranda; Rebecca Terrazas-Baxter; Elizabeth Moreno;  
Nidia Carranza; Jessie De Los Santos; Victor M. Nava;  
Sherri C. Smotherman; Juan De Lara; Raymond Leon;  
Shirley Chronister; Sergio T. Cardenas; Alma Estrada; Francisca Castro  
Eugene Bumbera; Isidoro Romero

Desert Samaritans for Seniors

75-105 Merle Street #500

Palm Desert , CA 92211

www.dsfte.org

County

Riverside

FEIN

33-0762300

Founded: 1997

Previous Donation: ☒ Yes ☐ No \$10,000 4/27/2012 List Date 6/7/2013

**Mission:**

Desert Samaritans for Seniors (formerly known as Desert Samaritans for the Elderly) is the outgrowth of the "Golden Group Foundation", an organization formed in 1976 and spearheaded the building of the valley's only nonprofit retirement and health care center.

Desert Samaritans has cared for tens of thousands of seniors that other organizations have not been able to help. Their comprehensive Case Management Programs provides information/referral, assessment, benefits eligibility assistance, client advocacy and social work case management. In 2012 this program alone served almost 1,500 seniors and their families.

**Impact:**

A charitable contribution would go the many programs that are offered.

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned	\$20,859	10.3%	
Contributions	181,581	90.0%	
Other	(718)	-0.4%	
Total Revenue:	<u>\$201,722</u>	<u>100.0%</u>	
Expenses:			
Program	\$377,592	86.9%	
Administration	56,896	13.1%	
Fund Raising			
Total Expenses:	<u>\$434,488</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$232,766)</u>		
Net Assets:	<u>\$453,365</u>		
BOD:	Kim DuBeau; M. Andrew Duvall; Mary Hansen-Faris; Jo Anne Kennon; Rita Motter; Suzanne Armstrong		

Elder Help of San Diego, Inc.

4069 30th Street

San Diego , CA 92104

www.elderhelpofsandiego.org

County

San Diego

FEIN

95-2880426

Founded: 1973

Previous Donation: ☐ Yes ☒ No

List Date 11/1/2013

**Mission:**

ElderHelp provides personalized services and information that help seniors remain independent and live with dignity in their own homes.

**Impact:**

A donation would assist the organization in the furtherance of their mission

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$304,436	34.0%	
Contributions	588,309	65.7%	
Other	<u>3,124</u>	<u>0.3%</u>	
Total Revenue:	<u>\$895,869</u>	<u>100.0%</u>	
Expenses:			
Program	\$1,009,904	82.9%	
Administration	84,336	6.9%	
Fund Raising	<u>123,570</u>	<u>10.1%</u>	
Total Expenses:	<u>\$1,217,810</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$321,941)</u>		
Net Assets:	<u>\$643,205</u>		

BOD: Deb Martin; Mathew Fink; Emily Gates; Lisa Luiso; Kimberly McDonnel; Todd Miller; Amy Nelson; Elaine Balok; Shirley S. Thomas; Cindi Hill; Brad Pagano; Ken Davenport; Judith Wenker; Nicole Darling; Katie Wiest

F O O D Inc  
3403 E Central Avenue  
Fresno , CA 93725

www.communityfoodbank.net

County

Fresno

FEIN

77-0320851

Founded: 1997

Previous Donation: ☐ Yes ☒ No

List Date 1/17/2014

**Mission:**

Distribute food to the hungry in Fresno, Madera and Kings counties.

Community Food Bank Distributes virtually all food commodities received to local food pantries, residential shelters, community kitchens and adult and child day care centers. Community food bank has over 150 agencies in which food commodities are distributed.

For information on all their programs, visit the web site listed above.

**Impact:**

A donation would assist in feeding the needy in the three counties.

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$2,554,166	8.0%	
Contributions	27,378,811	86.1%	
Other	<u>1,860,406</u>	<u>5.9%</u>	
Total Revenue:	<u>\$31,793,383</u>	<u>100.0%</u>	
Expenses:			
Program	\$30,063,163	97.0%	
Administration	439,805	1.4%	
Fund Raising	<u>501,209</u>	<u>1.6%</u>	
Total Expenses:	<u>\$31,004,177</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$789,206</u>		
Net Assets:	<u>\$5,307,064</u>		

BOD: Bill Littlewood; Julie Olson-Buchanan; Rosa Kaiser; Gary Serrato; Mark Riley; Nan Mathias; Celia Ryan; Tina Daniel; Randy Wood; Christina Tillman; Joan Minasian; Bob Reyes; David Schechter; Alita Bryant-Taylor



Lazarus Project, Inc.

P.O. Box 1241

Roseville , CA 95678

www.lazarusprojectinc.org

County

Placer

FEIN

94-3312292

Founded: 1998

Previous Donation: ☒ Yes ☐ No \$15,000 11/13/2009 List Date 2/7/2014

**Mission:**

To meet the needs of the impoverished in Placer County by providing housing and comprehensive support services.

According to the United States Department of Housing and Urban Development a homeless individual living on the streets costs a community an average of \$40,000 per year. The Lazarus Project provides supportive housing for an individual for \$11,800 per year. This means that by providing 4 supportive housing residential homes for 20 individuals we save our community \$564,000. In addition, by providing supportive housing we have an increased long-term impact on an individuals life by stabilizing them in housing, health, and finances.

**Impact:**

A donation of funds would assist in their continuing mission

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$156,393	57.9%	
Contributions	113,529	42.0%	
Other	75	0.0%	
Total Revenue:	<u>\$269,997</u>	<u>100.0%</u>	
Expenses:			
Program	\$242,214	90.2%	
Administration	18,218	6.8%	
Fund Raising	<u>8,222</u>	<u>3.1%</u>	
Total Expenses:	<u>\$268,654</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$1,343</u>		
Net Assets:	<u>\$181,726</u>		

BOD: Betsy Donovan; Bobbi Donovan; Thomas Carlson; Jerry Angove; Mark Boles; Paul Boudier; Don Branner; Douglas Floodman; Michael McKeon; Marian Tiedemann

# Legal Services of Northern California

517 12th Street

Sacramento , CA 95814

lsnc.net

County

Sacramento

FEIN

94-1384659

Founded: 1956

Previous Donation: ☐ Yes ☒ No

List Date 12/13/2013

## **Mission:**

LSNC serves a low-income population of over 500,000 spread over an urban/ rural (mostly rural, outside of Sacramento and a handful of relatively small cities) area that encompasses 49,005 square miles, roughly the size of Ohio.

The population we serve is largely minority. The census data suggests the following racial/ethnic profile of the poverty population: White, 40%; African-American, 9%; Native American, 3%; Asian, 10%; Hispanic, 20%; Other, 17%. LSNC serves the second largest Hmong population and the largest Mienh community in the United States. Our northern and coastal counties and the San Joaquin river delta are home to thousands of migrant farm workers who cultivate and harvest the tree and row crops, including wine grapes, that support California's agricultural industry. The north state is also home to a significant Native American population for whom our staff provide special outreach and services.

## **Impact:**

A donation would assist the organization in providing legal services within Northern California.

## **Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned	\$8,301,496	84.6%	
Contributions	1,364,931	13.9%	
Other	<u>150,507</u>	<u>1.5%</u>	
Total Revenue:	<u>\$9,816,934</u>	<u>100.0%</u>	
Expenses:			
Program	\$8,744,431	82.1%	
Administration	1,783,927	16.7%	
Fund Raising	<u>123,149</u>	<u>1.2%</u>	
Total Expenses:	<u>\$10,651,507</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$834,573)</u>		
Net Assets:	<u>\$4,588,692</u>		

BOD: Officers: Kevin R. Johnson, President; Jane Kroesche, Vice President; David A. Coleman Sr., Secretary; John F. Davis, Treasurer; H. Patrick Sweeney, Executive Member; Annette Smith, Executive Member

Liberty Hill  
6420 Wilshire Boulevard, Suite 700  
Los Angeles , CA 90048

www.LibertyHill.org

County Los Angeles

FEIN

51-0181191

Founded: 1976

Previous Donation: ☒ Yes ☐ No \$25,000 4/6/2011 List Date 12/13/2013

**Mission:**

Liberty Hill advances social change through a strategic combination of grants, leadership training and campaigns.

Liberty Hill is first to identify community leaders at the front lines of change. We invest in change makers and equip them with the skills and relationships they need to build power and advance social justice. With a near 40-year track record, Liberty Hill is uniquely positioned to bring together forces for change and forge a common agenda for equality and opportunity in Los Angeles.

**Impact:**

A donation would be used to assist in the continuation of their programs

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned			
Contributions	9,332,072	98.3%	
Other	<u>156,669</u>	<u>1.7%</u>	
Total Revenue:	<u>\$9,488,741</u>	<u>100.0%</u>	
Expenses:			
Program	\$6,425,197	82.3%	
Administration	703,308	9.0%	
Fund Raising	<u>681,565</u>	<u>8.7%</u>	
Total Expenses:	<u>\$7,810,070</u>	<u>100.0%</u>	
Excess/(Deficit) of			
Revenues Over Expenses:	<u>\$1,678,671</u>		
Net Assets:	<u>\$15,001,176</u>		

BOD: Jane Peebles; Shana Weiss; Joseph Ybarra; Paula Litt; Mary Ann Brauback; Wendy Chang; Ange-Marie Hancock; James E. Herr; Gordon Lee; John Manulis; Melinda Newman; Sarah Pillsbury; Sara D. Sadhwani; Latonya Slack; Elizabeth Stewart; Gary Stewart; Steve White; Amelia Williamson

Maitri Charitable Trust  
PO Box 697  
Santa Clara , CA 95052

www.maitri.org

County Santa Clara

FEIN

94-3132087

Founded: 1991

Previous Donation: ☒ Yes ☐ No \$25,000 8/26/2010 List Date 8/30/2013

### **Mission:**

Maitri's mission is to foster self-reliance and self-confidence in South Asian women and their children who have been impacted by DV, human trafficking, family conflict, and cultural isolation, by helping women learn how to help themselves. Maitri recognizes that the social and cultural separation or isolation that its clients experience contributes to their problems. In response, Maitri helps clients integrate into mainstream American society so they feel comfortable and capable to participate in it.

### **Impact:**

Maitri would be able to continue to provide services to an underserved community.

### **Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$160,552	47.8%	
Contributions	174,361	51.9%	
Other	<u>846</u>	<u>0.3%</u>	
Total Revenue:	<u>\$335,759</u>	<u>100.0%</u>	
Expenses:			
Program	\$477,277	95.4%	
Administration	12,799	2.6%	
Fund Raising	<u>10,235</u>	<u>2.0%</u>	
Total Expenses:	<u>\$500,311</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$164,552)</u>		
Net Assets:	<u>\$952,006</u>		

BOD: Soninder Pelia  
Roma Majumdar  
Anjali Dujari  
Mukta Sharangrani

MUZEO Foundation  
241 S. Anaheim Blvd.  
Anaheim , CA 92805

[www.muzeo.org](http://www.muzeo.org)

County

Orange

FEIN

20-8785986

Founded: 2007

Previous Donation: ☒ Yes ☐ No \$3,198.41 5/18/2009 List Date 12/13/2013

### **Mission:**

The MUZEO (which means "museum" in the international language of Esperanto) re-invents the concept of a regional cultural center for 21st century audiences. The MUZEO concept is truly visionary – transforming the image of our grandparents museum experience with state-of-the-art self guided audio podcasts, Wi-Fi access, interactive elements, interchangeable display capabilities and modern-day research facilities.

"One major goal of the MUZEO is to broaden people's awareness of the matters and issues outside their immediate environment by introducing three national and international traveling exhibits each year," said Peter Comiskey, executive director of the MUZEO. "This exciting new addition to Orange County's cultural scene will be buzzing virtually 24/7 with both the featured exhibit and an eclectic mix of companion activities and events."

### **Impact:**

A donation would assist the organization in its overall goals.

### **Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$414,095	49.0%	
Contributions	431,305	51.0%	
Other			
Total Revenue:	<u>\$845,400</u>	<u>100.0%</u>	
Expenses:			
Program	\$674,422	74.4%	
Administration	183,571	20.2%	
Fund Raising	<u>49,073</u>	<u>5.4%</u>	
Total Expenses:	<u>\$907,066</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$61,666)</u>		
Net Assets:	<u>(\$86,809)</u>		

BOD: John O'Brien; Robert Newman; Kris Murray; Shaheen Sadeghi; Harry S. Sidhu; Jill Bolton; Donna Kelly; Robin Capalbo; Steve Faessel; Kevin Dow; Sandra Day; Jolynn Benn; Bette Aitken; Wendy Adams; Elisa Stipkovich; William Taormina; Curt Pringle

National Forest Foundation  
c/o Vance Russell 803 2nd St., Suite A  
Davis , CA 95616

www.nationalforests.org

County

Yolo

FEIN

52-1786332

Founded: 1990

Previous Donation: ☐ Yes ☒ No

List Date 12/13/2013

### **Mission:**

The mission of the National Forest Foundation is to engage America in community-based and national programs that promote the health and public enjoyment of the 193-million-acre National Forest System.

The proposed project is designed to connect and involve communities in the forests that are essentially in their backyards in Northern CA. Any dollar donated to this project is leveraged to \$2.50 from Forest Service and local partner match. The project has on-ground restoration projects coupled with community volunteer days for weed removal, tree planting and sustainable recreation.

### **Impact:**

A donation would assist in the completion of the Tahoe Project.

### **Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$5,413,977	48.2%	Financial Statement and a project synopsis is available if you desire a copy.
Contributions	5,575,015	49.6%	
Other	<u>253,011</u>	<u>2.3%</u>	
Total Revenue:	<u>\$11,242,003</u>	<u>100.0%</u>	
Expenses:			
Program	\$12,271,192	94.1%	
Administration	577,962	4.4%	
Fund Raising	<u>193,614</u>	<u>1.5%</u>	
Total Expenses:	<u>\$13,042,768</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$1,800,765)</u>		
Net Assets:	<u>\$8,640,417</u>		

BOD: John Hendricks; Craig R. Barrett; David Bell; Bradley K. Johnson; Timothy Proctor Schieffelin; Peter Foreman; Mike Brown Jr.; Thomas L. Tidwel; Coleman Burke; Robert Cole; Bart Eberwein; Robert Feitler; Lee Fromson; Roje S. Gootee; Jack Sahl; Jeff Paro; Susan Schnabel; Chad Weiss; James Yardley; Blaise Carris; Mary Smart; William J. Possiel

Nine O'Clock Players / Assistance League of Southern CA

1370 N. St. Andrews Place

Los Angeles , CA 90028

www.nineoclockplayers.com

County

Los Angeles

FEIN

95-1641960

Founded: 1923

Previous Donation: ☐ Yes ☒ No

List Date 9/20/2013

**Mission:**

To bring live theater to the children and parents of Los Angeles County.

**Impact:**

A donation would assist in continuing the program

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned	\$12,168,326	76.6%	
Contributions	2,506,152	15.8%	
Other	<u>1,205,467</u>	<u>7.6%</u>	
Total Revenue:	<u>\$15,879,945</u>	<u>100.0%</u>	
Expenses:			
Program	\$12,002,347	84.9%	
Administration	1,912,421	13.5%	
Fund Raising	<u>230,306</u>	<u>1.6%</u>	
Total Expenses:	<u>\$14,145,074</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$1,734,871</u>		
Net Assets:	<u>\$17,012,368</u>		

BOD: Wendy Taylor; Wendy Overmire; Suzanne Kahane; Sue Thalken; Sheila Swicker; Sally Hinckley; Patricia Vogt Rowey; Pat Mulville; Nancy Wallan; Joann Koll; Jeanie McCarthy; Jacquelyn Callas; Floran Fowkes; Colleen Gold; Cheryl Van Tassel; Carol Deeter; Audrey Fimpler; Anne Page; Andrea Goodman

San Francisco Senior Center

890 Beach Street

San Francisco , CA 94109

www.sfsenior.com

County San Francisco

FEIN

94-1212136

Founded: 1947

Previous Donation: ☐ Yes ☒ No

List Date 11/1/2013

**Mission:**

San Francisco Senior Center (SFSC) was founded in 1947 and is the oldest nonprofit senior center in the nation. SFSC is a multi-service, multi-site agency. SFSC offers a variety of services from daily, low-cost, nutritious lunches and comprehensive social services and case management to healthy living programs and continuing education. All activities are designed to encourage socialization, independent and active living while preventing isolation. There are two sites: Aquatic Park, located on the Bay by Ghirardelli Square, and Downtown, established in 1966 in the Tenderloin. Every year over 2,000 participants come through the SFSC's doors. Our participants range from well or able bodied to very frail or disabled; from the newly retired to octogenarians and centenarians.

**Impact:**

A donation would assist the organization with its programs

**Financial Information:** IRS Form 990 for FY 1012

Revenues:	Amount	%	Notes
Government/Earned	\$639,283	49.6%	
Contributions	650,610	50.4%	
Other	<u>184</u>	<u>0.0%</u>	
Total Revenue:	<u>\$1,290,077</u>	<u>100.0%</u>	
Expenses:			
Program	\$1,276,624	85.0%	
Administration	150,744	10.0%	
Fund Raising	<u>74,627</u>	<u>5.0%</u>	
Total Expenses:	<u>\$1,501,995</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$211,918)</u>		
Net Assets:	<u>(\$243,598)</u>		

BOD: Lawrence Lurie; Robin Myers; Eileen Ward; Adoria Caradine; Maris Corush; Laura Gibson; Alvin Huie; Claudia Klossner; John Milford; William Marotta



Seal-Naval Special Warfare Foundation-San Diego

4320 La Jolla Vlg Dr Ste 250

San Diego , CA 92122

www.sealteamevents.com

County

San Diego

FEIN

27-1963880

Founded: 2010

Previous Donation: ☒ Yes ☐ No \$30,000 11/4/2011 List Date 10/11/2013

**Mission:**

Providing for the needs of the families and children of Navy SEALs and other Naval Special Warfare Seamen who are wounded or killed in combat.

**Impact:**

A donation would assist in their mission

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned Contributions	335,233	100.0%	
Other			
Total Revenue:	<u>\$335,233</u>	<u>100.0%</u>	
Expenses:			
Program	\$403,251	98.5%	
Administration	6,220	1.5%	
Fund Raising			
Total Expenses:	<u>\$409,471</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$74,238)</u>		
Net Assets:	<u>\$154,363</u>		
BOD:	Craig A. Irving; Bill Strauss; John Heffner		

SeniorNet - Sacramento NE Location

4540 American River Drive

Sacramento , CA 95864

www.seniornet.org

County

Sacramento

FEIN

30-0594290

Founded: 1986

Previous Donation: ☐ Yes ☒ No

List Date 11/1/2013

**Mission:**

Mission Statement: SeniorNet's mission is to provide older adults education for and access to computer technologies to enhance their lives and enable them to share their knowledge and wisdom.

Who We Are: Founded in 1986, SeniorNet grew out of a research project funded by the Markle Foundation to determine how computers and telecommunications could enhance the lives of older adults. Since that time, SeniorNet has grown into an independent, international, volunteer-based nonprofit organization that is one of the world's leading technology educators of adults 50 +. Headquartered in Herndon, Virginia, SeniorNet has an international membership of computer users, hosts the thriving SeniorNet website at www.seniornet.org, and supports a large network of locally operated Learning Centers throughout the United States and internationally.

**Impact:**

A donation would enhance the program in Sacramento

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned	\$186,824	70.9%	Parent Corporation is in Virginia but they have a site that is sponsored in Sacramento.
Contributions	64,235	24.4%	
Other	<u>12,356</u>	<u>4.7%</u>	
Total Revenue:	<u>\$263,415</u>	<u>100.0%</u>	
Expenses:			
Program	\$308,828	78.7%	
Administration	70,723	18.0%	
Fund Raising	<u>12,675</u>	<u>3.2%</u>	
Total Expenses:	<u>\$392,226</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$128,811)</u>		
Net Assets:	<u>\$309,182</u>		

BOD: Jeaneen Logan; William Grubb, Jr.; Paul DelPonte; Daniel Wilson; Nicholas Brown; Paul Sladkus; Alfred Moye; Slava Vero; Jack Deeds; Debra Berlyn; Leslie M. Smith; Josip Markus

## Serve the People

1206 E. 17th Street, Suite 204

Santa Ana , CA 92701

www.serve-the-people.com

County

Orange

FEIN

27-0421556

Founded: 2008

Previous Donation: ☐ Yes ☒ No

List Date 2/7/2014

### **Mission:**

To provide for the physical, mental, emotional and mentoring needs of the poor, children, sick, needy, uneducated, oppressed and lost people. To serve people regardless of religion, ethnicity, race, or gender with love, compassion, and generosity. Orange County, home to some of the most exclusive neighborhoods in the nation, is one of the most expensive places to live in the U. S. Despite its affluent reputation, Orange County has significant pockets of poverty where low-income households struggle to afford many basic needs, including nutrition and medical coverage. Serve the People (STP) provides food, clothing, medical care, and legal assistance, giving a hand up, and not just a hand-out. Since its founding in 2008, STP has centered its programs on the needs of the residents in Central Santa Ana, providing a trusted resource for people who have nowhere else to go for their healthcare.

### **Impact:**

A donation would assist their program

### **Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned			
Contributions	3,806,518	100.0%	
Other			
Total Revenue:	<u>\$3,806,518</u>	<u>100.0%</u>	
Expenses:			
Program	\$3,662,495	98.7%	
Administration	41,286	1.1%	
Fund Raising	<u>7,464</u>	<u>0.2%</u>	
Total Expenses:	<u>\$3,711,245</u>	<u>100.0%</u>	
Excess/(Deficit) of			
Revenues Over Expenses:	<u>\$95,273</u>		
Net Assets:	<u>\$188,706</u>		

BOD: Angel Carrazco; Jose Antonio Fermin; Craig G. Myers; Nicolette Ortega; Paul Widenmann; Dimitri Sirakoff; S. Russell English; Robert Ingraham; Walter (Dima) Martinovich

Spirit Awakening Foundation

PO Box 11643

Marina del Rey , CA 90295

www.spiritawakening.org

County

Los Angeles

FEIN

95-4585425

Founded: 1995

Previous Donation: ☐ Yes ☒ No

List Date 7/19/2013

**Mission:**

Writes of Passage - The Writes of Passage curriculum is the cornerstone for all Spirit Awakening programs. Students advance through three levels, usually over a twelve to sixteen week period.

Tools of Empowerment Program - The Spirit Awakening Foundation has a grant contract with the Los Angeles County Probation Department to provide gender specific services in six middle schools. This program reached 350 at-risk girls with the core program, tutoring, mentoring, cultural and recreational activities, mother-daughter events, and speakers. School attendance, self-esteem, and grades improved significantly.

Juvenile Detention Camp Program - About three times a year Spirit Awakening delivers Writes of Passage to incarcerated youth. They are there for many reasons- truancy, gang activity, drug abuse, prostitution; many have been physically, emotionally or sexually abused. They learn life skills, improve communication, set goals, build self-esteem and commit to service.

**Impact:**

A donation will provide funding for the programs that are provided.

**Financial Information:** IRS Form 990 for FY 2011

Revenues:	Amount	%	Notes
Government/Earned			
Contributions	177,651	100.0%	
Other			
Total Revenue:	<u>\$177,651</u>	<u>100.0%</u>	
Expenses:			
Program	\$97,925	94.2%	
Administration	6,006	5.8%	
Fund Raising			
Total Expenses:	<u>\$103,931</u>	<u>100.0%</u>	
Excess/(Deficit) of			
Revenues Over Expenses:	<u>\$73,720</u>		
Net Assets:	<u>\$30,361</u>		

BOD: Akuyoe Graham; Daniel Damah; Natalie Gluck; Judy Nieh

The Eugene A. Obregon / Latino Medal of Honor Campaign

6953 Trolley Way

Playa del Rey , CA 90293

obregoncmh.org

County

Los Angeles

FEIN

95-4457163

Founded: 1993

Previous Donation: ☐ Yes ☒ No

List Date 10/11/2013

**Mission:**

The Foundation was co-founded on September 16, 1993, by three World War II veterans: William D. Lansford, Al Flores, and Pete Valdez, as a charitable 501(c)(3) non-profit, tax-exempt Foundation (IRS # 95-4457163). It is dedicated to erecting a monument to the 40 Latin American recipients of America's highest military award, the Congressional Medal of Honor.

**Impact:**

A donation would go to the erection of the monument.

**Financial Information:**

IRS Form 990-EZ for FY 2009

Revenues:	Amount	%	Notes
Government/Earned			The organization may not have had enough revenues to require a filing of information after 2009
Contributions	15,388	100.0%	
Other			
Total Revenue:	<u>\$15,388</u>	<u>100.0%</u>	
Expenses:			
Program	\$40,881	100.0%	
Administration			
Fund Raising			
Total Expenses:	<u>\$40,881</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$25,493)</u>		
Net Assets:	<u>\$55,138</u>		

BOD: William Douglas Lansford; Christopher J. Kinsman; Diana M. Turnacliff; Keith Jeffreys; Jim Proser; Alexander Flores; Pete Valdez; Frank Juarez; Clara Juarez

UC Berkeley - California Independent Scholar Network Program

Controllers Office - 2195 Hearst Avenue, Room 130

Berkeley , CA 947201108

www.berkeley.edu

County

Alameda

FEIN

94-6002123

Founded: 1939

Previous Donation: ☒ Yes ☐ No \$20,000 12/7/2012 List Date 11/22/2013

**Mission:**

The Cal Independent Scholars Network Program (CISN) provides support and resources to incoming freshman, transfer, and continuing students who have recently emancipated from foster care, or are orphaned, and certified independent by the Financial Aid Office. By providing individual support, guidance, and resources to assist students in their transition to Cal, we facilitate their academic progress, personal development, and promote the realization of their educational and career goals.

CISN collaborates with the Financial Aid Office who determines student eligibility for this program. Prospective CISN students are former foster youth, orphaned, or certified independent students identified through self-reported admissions and financial aid data. After determining eligibility, we invite students to participate in the CISN Program.

**Impact:**

A donation would be used to assist the program

**Financial Information:**

Financial Report

Revenues:	Amount	%	Notes
Government/Earned			I will provide a financial report from UC Berkeley if requested
Contributions			
Other			
Total Revenue:			
Expenses:			
Program			
Administration			
Fund Raising			
Total Expenses:			
Excess/(Deficit) of			
Revenues Over Expenses:			
Net Assets:	\$4,571,750,000		
BOD:			

Woodland Community College Foster and Kinship Care Education (FKCE)

2300 East Gibson Road ATTN: Cherie Schroeder

Woodland , CA 95776

www.yolofostercare.com

County

Yolo

FEIN

23-7222541

Founded: 1972

Previous Donation: ☐ Yes ☒ No

List Date 12/13/2013

**Mission:**

The Woodland Community College Foster and Kinship Care Education (FKCE) program serves Yolo County foster parents, kinship/relative care providers, and individuals interested in becoming foster parents or in adopting a child.

The mission of Woodland Community College Foster and Kinship Care Education (FKCE) is to provide quality education and training for care providers of children and youth in out-of-home care so that these providers can meet the child's educational, emotional, behavioral and developmental needs. There are 523,000 reasons to provide education and support to families caring for children placed outside their birth families. This is the number of youth in the United States currently living in foster care because their own family is in crisis and cannot provide for their day-to-day needs.

**Impact:**

A donation would assist the program in providing support for their Christmas program and also for continuing operations

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned			There was a loss of \$469,514 on sale of assets previously valued at \$5,485,259. The program operates under the Yuba College Foundation Inc.
Contributions	137,194	-136.4%	
Other	<u>(237,740)</u>	<u>236.4%</u>	
Total Revenue:	<u>-\$100,546</u>	<u>100.0%</u>	
Expenses:			
Program	\$123,707	58.0%	
Administration	89,685	42.0%	
Fund Raising			
Total Expenses:	<u>\$213,392</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>(\$313,938)</u>		
Net Assets:	<u>\$6,625,371</u>		

BOD: Adrian Lopez; Dr. Douglas Houston; Dr. Angela Fairchilds; James Buchan; Xavier Tafoya; David Althausen Jr.; Marcela Bautista; Hiedi Anderson; Angel Barajas; Wayne Ginsburg; Sean Kolb; Donna Neu; John Cassidy; Tara Perrin-Preus; Tony McDaniel; Cindyf Seidel; Christopher Myers; Leslie Williams; Rodney Beilby; Dr. Kayleigh Carabajal

Yolo County Food Bank

1244 Fortna Ave

Woodland , CA 95776

www.yolofoodbank.org

County

Yolo

FEIN

23-7111782

Founded: 1971

Previous Donation: ☐ Yes ☒ No

List Date 12/13/2013

**Mission:**

Founded as a volunteer-run backyard gleaning program, Yolo Food Bank has grown to an organizational network of staff, volunteers, and partner agencies. We coordinate the storage and distribution of food from a network of growers, manufacturers, distributors, wholesalers and grocery stores, while cultivating new sources of food. We collaborate with non-profit programs, private and public sector agencies, and service organizations throughout Yolo County to serve 25,000 people each month and distribute 3 million pounds of food annually.

Hunger in rural areas is typically higher than the national average. Unfortunately, Yolo County is no exception. Despite our location in a prominent agricultural region, there are more than 35,000 food insecure people in Yolo County, including more than 13,000 children who participate in free and reduced meal programs.

**Impact:**

A donation would assist the program in providing food to those in need.

**Financial Information:** IRS Form 990 for FY 2012

Revenues:	Amount	%	Notes
Government/Earned	\$344,001	6.3%	
Contributions	5,135,951	93.7%	
Other	2,185	0.0%	
Total Revenue:	<u>\$5,482,137</u>	<u>100.0%</u>	
Expenses:			
Program	\$5,151,736	95.5%	
Administration	245,182	4.5%	
Fund Raising			
Total Expenses:	<u>\$5,396,918</u>	<u>100.0%</u>	
Excess/(Deficit) of Revenues Over Expenses:	<u>\$85,219</u>		
Net Assets:	<u>\$1,358,542</u>		

BOD: Tom Muller; Jim Durst; Tom Richardson; Terri Labriola; Jewel Trotter





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## **PROCEDURAL ITEMS FOR THE CFPF SUMMARY AND RECOMMENDATIONS**

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Items: A1, A2, A3

Action: Pursuant to the by-laws and procedures of CFPF, each meeting starts with the call to order and roll call (A1) and proceeds to a review and approval of the minutes from the prior meeting (A2). After the minutes have been reviewed and approved, time is set aside to allow for comments from the public (A3).

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