Dear CalNonprofits members and friends:

It’s so hard to try to sum up a tumultuous year like 2018 in just a few dot points. California’s nonprofits stood up to manage the impact of wildfires, floods, policies that targeted immigrant and other communities of color, and most recently the government shutdown. Sometimes it’s hard to remember that big events like the 2018 election took place only a few months ago! The good news: we nonprofits are getting faster and better at adapting, turning around, morphing, and maintaining our balance in the changing windstorms.

It’s been a year of Nonprofits Standing Up for California:

- Nonprofits were crucial to record-breaking voter turnout in November, resulting in a more diverse and more outspoken legislature than we have seen before.
- Nonprofits went beyond their missions around the fires, including museums giving free admission to children whose schools were closed due to smoke, or community organizers taking face masks into the fields for farmworkers who were still required to work, or food banks moving tons of food quickly and safely into high need areas, or climate activists making sure the lessons of the fires are not forgotten.
- At CalNonprofits we’re proud that hundreds of nonprofits worked with us to stall a bill that would have left doors open to abuses in online fundraising and crowdfunding. (And we’re now meeting with both the Attorney General and PayPal to see if a donor- and nonprofit-friendly bill can be crafted.)
- We’re also pleased that our social enterprise — CalNonprofits Insurance — hit new highs providing more than 20,000 nonprofit employees with health insurance and more than 1,000 nonprofits obtaining D&O, liability, and cyber insurance through us. (And not incidentally, helping to fund nonprofit advocacy with a portion of revenue going to CalNonprofits public policy work.)
- We’ve joined with thousands of nonprofits in championing racial equity, in fighting workplace harassment, and in speaking out on so many issues of concern to our communities. Through our publications, research, conferences, town halls, and webinars, we’ve been Standing Up for California.

If you’re a CalNonprofits member, someone who called their state senator, signed a letter to the Assembly, passed along our legal/compliance resources, or served on one of our policy task forces (student debt, overhead, Teleconnect Fund, or state grants gateway), thank you for letting us work with you. And if you’ve written or called about something we said or did that you didn’t like, we thank you as well. The California nonprofit community needs CalNonprofits to be as smart and strong as possible, and we get better every time we hear from our community.

Jan Masaoka, CEO
CalNonprofits
CalNonprofits Board Chair
Jan Masaoka, CEO
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NEWSLETTER DESIGN
TraversoSantana.com
FROM THE CALIFORNIA STATE CAPITOL

Policy Update and Looking Ahead

In 2018, together with our members and allies, CalNonprofits scored some impressive policy victories, and we’re hitting the ground running in 2019.

In the first part of 2018 we worked to oppose a problematic effort to enshrine in law weak fundraising disclosure and other rules for crowdfunding platforms such as those hosted by PayPal, Facebook, Indiegogo, Network for Good, and many others. While many nonprofits have successfully raised funds through these platforms, there are also reports that donations are not getting to nonprofits, that scam artists are raising money for nonprofits but actually taking the money themselves, that platforms are taking large undisclosed cuts of donations, and so forth. Our members and allies shared their concerns and stories, and we were relieved to see AB 2556 defeated in the Assembly Appropriations Committee. In 2019 we will continue to make sure that crowdfunding platforms are held to the same high ethical and transparent standards as nonprofits. We are pleased to see that the Principles for Responsible Crowdfunding we published late last year are now being used across the country as regulators grapple with this new technology.

We’re especially proud of helping create an online portal to centralize all state funding opportunities and enable nonprofits to apply for grants online (AB 2252.) Sponsored by CalNonprofits, authored by Assemblymember Monique Limón and signed into law, this addresses a problem that has frustrated so many of us for a long time – how hard it is to identify funding opportunities available from the State of California.

Now it’s time to implement the law! The state library is responsible for building the website and CalNonprofits is partnering with them to make sure it’s easy for nonprofits to use. We’ve assembled a task force comprised of members from across the state and from a wide variety of sub-sectors to help advise us and the library on this project. The first meeting of the task force is scheduled for this spring. If you’re interested in joining the task force, send an email to Nancy Berlin at nancyb@calnonprofits.org. We’re excited to be key players in this effort to make funding for nonprofits more available and equitable.

The 2020 Census is now just one year away and nonprofits, as trusted partners in their communities, will play a crucial role in guaranteeing a complete and accurate count in California. Why does accuracy matter? Because $76 billion in federal funding that California receives each year is based in part on census data. It’s also used to determine Congressional representation, and some experts suggest California could be at risk of losing a Congressional seat if we don’t count everyone in our state.

As a member of the Census Policy Advocacy Network (CPAN), CalNonprofits is working with other statewide organizations in California to advocate and shape policy concerning the 2020 Census. And our collective work has paid off – last year California allocated $90 million for the upcoming Census, with $27 million earmarked specifically for community-based outreach. The first round of funds will be distributed to nonprofits this spring. And while we’re pleased to see that Governor Newsom’s budget proposes an additional $50 million for the Census, with $15.9 million allocated for community-based outreach, this won’t be enough to reach the 19.3 million individuals estimated as hard-to-count in our state. Nonprofits stand ready, willing, and uniquely qualified to help, but will need adequate funding to do the job well. That’s why we’ve already begun strategizing to get additional state funds to help nonprofits get out the count.

In our continuing efforts to support nonprofit staff, we supported AB 38 (Stone) because we’ve seen and heard from nonprofit employees who are encountering problems with their student loan servicers. Signed by Governor Brown, this law ensures that borrowers are given reliable information, quality customer service, and meaningful access to repayment and forgiveness programs. Supporting nonprofit staff with student debt is an important part of CalNonprofits’ work supporting the nonprofit workforce.

At the federal level, the recent government shutdown illustrated that what happens in Washington affects California, and what impacts California nonprofits, who make up 15% of California’s Gross State Product, affects all Californians. We asked our members to tell us what was happening on the ground in their nonprofits and in the communities they serve, and we got an earful. We delivered those stories to the entire California Congressional delegation to make sure they understood the difficulties, fears, and uncertainties their constituents faced as the shutdown dragged on. We hope we don’t have to endure another shutdown, but you can be sure that we’ll be there to act on your behalf if that happens.

As we move into 2019, we take to heart the call of the CalNonprofits board, who adopted two broad goals this year: to be proactive and to increase our capacity for advocacy. As we embark on emerging opportunities, we’ll also continue to be on the lookout for legislation and policies that could harm nonprofits, and be ready to act. We look forward to engaging with all of you along the way.
Dear California’s Members of Congress:  
Nonprofits are Powerful and Paying Attention

After the 2018 election, on behalf of all nonprofits in California, CalNonprofits sent letters to all the newly elected California Congressional delegation reminding legislators about the importance of nonprofits in our communities.

“Our state’s nonprofits not only represent the dreams and aspirations of California’s varied communities, but they are also robust with human capital, financial capacity, and innovative potential. Causes Count, CalNonprofits’ report documenting the economic impact of California’s nonprofit organizations, notes that California nonprofits generate $260 billion in total economic activity every year and nearly one million people are employed by nonprofits in California, accounting for one in sixteen California workers.”

We also pointed out that “federal laws can have big impacts on nonprofits, sometimes in unexpected and unintended ways.” California has 53 members of the House of Representatives – more than any other state. As a result, California members of Congress are crucial to many national issues. Our letter to them highlighted four key issues:

• protecting the Johnson Amendment,
• opposing the UBIT tax on transportation benefits,
• creating a universal or non-itemizer charitable deduction for all Americans, and
• making sure all Californians are counted in the 2020 Census through additional funding for outreach and opposing the addition of a question about citizenship.

You can read the full letter on our website: www.calnonprofits.org.

Exciting Changes at GrantAdvisor.org

We heard your feedback and we’re taking action!

Thanks to the hundreds of grantseekers and funders who have contributed their ideas and perspectives about each other, and about GrantAdvisor itself, CalNonprofits and our partners are implementing a few updates to the site. The goal is to build a more valuable resource for both grantseekers and grantmakers.

What is GrantAdvisor? Launched in the summer of 2017, it’s a website that gathers the “wisdom of the crowd” to help nonprofits and funders develop better relationships and bring accountability and transparency to the grantmaking process. Development staff, grantwriters, and others can write anonymous reviews of their interactions with foundations and funders, including sharing advice for colleagues and rating the funder on accessibility and other measures. Funder profiles are published after 5 reviews are submitted, and funders can publicly respond.

Now we’ve given GrantAdvisor a makeover so it’s easier to use!

• Streamlined homepage makes it easier to log in, see reviews, and write your own
• New, more robust search features
• Highlighting funders that only need one or two more reviews to go live
• New blog with news, advice, and resources for grantseekers

2019 will be an exciting year for the growth of GrantAdvisor with new partners across the U.S. and in the U.K. We’ll continue working to improve the site and continue to foster honest conversations between funders and grantees. The success of this experiment depends on the contributions by grantwriters and nonprofit development folks – in other words, you!

If you agree that breaking down barriers between funders and nonprofits is a good idea, follow this recipe to help make it happen:

1. Go to www.grantadvisor.org and register (all reviews are anonymous, registering allows you to see reviews you’ve written previously.)

2. Write a review of interactions you’ve had with funders (and if you’ve worked with a foundation three or four times, write a review of each interaction or grant cycle.)

3. Sign up to receive a weekly email digest of recent reviews, a list of funders that need a couple more reviews to go live, and news from the world of grantmaking.

4. Encourage your friends and colleagues to read and write reviews too!

Together with our partners at the Minnesota Council of Nonprofits and GreatNonprofits, we’re working to make GrantAdvisor a useful resource and a catalyst for change. Join us at www.grantadvisor.org.

WHAT ARE PEOPLE SAYING ABOUT GRANTADVISOR?

“The mystery about certain Foundations, the elitism, the “shrouding in secrecy” and stiff arm/locked door common with large Foundations – GrantAdvisor breaks down that power and holds program officers and Foundation leadership accountable to their grantees and to their prospective grantees. It also celebrates those Foundations who are open to building a relationship, exploring new projects, and who welcome discussions to guide possible grantees. This site is nothing short of brilliant.”
Three Cornerstone Insurance Policies You Need

We are very proud that our social enterprise, CalNonprofits Insurance Services (CNIS), is now providing insurance to more than 1,000 nonprofits! Many of these take advantage of our exclusive health, dental and vision plans for nonprofits...in fact, more than 20,000 nonprofit employees obtain their health insurance through us!

You may not know that we have three offices for CNIS: Los Angeles, San Francisco, and Capitola. Our San Francisco office is led by broker extraordinaire Cole Kinney – he’s one of the smartest and nicest people in the insurance business, and we’re pleased he has joined us. And if your nonprofit hasn’t taken advantage of CNIS: well, please reach out! Call us at 800-776-4226 and ask for Marvin Miller. He can connect you with just the right person at CNIS.

Now: What are the three basic insurances you (almost certainly) need?

First, pretty much everybody needs General Liability insurance – and it’s often required by landlords and funders. If a box of books lands on a volunteer or a child slips and falls on your site, General Liability insurance will pay for the damages, if your organization is considered at fault. The good news: GL insurance doesn’t have to be that expensive.

Sometimes new nonprofits opt instead to get short-term policies that only cover special events, for example. Be careful though: it may be less expensive simply to get a General Liability policy that covers all your operations (including events) rather than have to get multiple short-term policies. Volunteers are automatically included as insureds under the standard General Liability form used by most carriers.

D&O

The second insurance to consider is Directors & Officers Liability Insurance (D&O), sometimes also called Management Liability Insurance. These claims can include spending restricted funds on a different program (misuse of funds) or if someone claims the organization has damaged their reputation in some way. One organization we know had to pay a $5 million settlement for misuse of funds! Luckily, D&O pays for the legal help you’ll need to defend the lawsuit, and for judgments against individual board members. (Remember: D&O cannot pay for liabilities related to unpaid payroll taxes or other taxes.)

Board members – and prospective board members! – often feel more comfortable being on a board when the nonprofit has D&O insurance.

We typically recommend that you include coverage for Employment Practices Liability (EPL) on your D&O policy to protect against employment-related bad decisions. The most common type of lawsuit against nonprofits – wrongful termination – is usually a lawsuit brought against the organization but also members of the board. Other common claims against nonprofits are discrimination, sexual harassment, and failure to accommodate an employee with a disability.

Nonprofits who work with vulnerable populations and nonprofits with controversial causes: these nonprofits and their board members are especially susceptible to lawsuits. In other words: these nonprofits especially need D&O insurance.

Cars, cars and cars

Third, nonprofits should also have insurance to cover car crashes that happen while employees or volunteers are driving on behalf of the organization, even if they drive their own cars and have their own insurance. Auto accidents are one of the leading causes of claims against nonprofits, and even if the organization does not own any cars or trucks, you can still be held responsible if your volunteers or employees are driving on your behalf at the time of the accident. This type of coverage, called Commercial Auto Insurance and Hired/Non-Owned Auto coverage, can sometimes be added to the General Liability Insurance, or it can be a separate line of coverage on a package policy.

This insurance pays after the personal auto policy carried by your volunteers and employees, and can also cover damage to cars or trucks that you lease, hire, rent or borrow (other than those owned by your employees and volunteers). There are a few endorsements that you need to include: Employees as Insureds, Employee Hired Auto, and Volunteers as Employees. If a staff person crashes on the way to a special event or a volunteer crashes while delivering meals, you want to be sure you can do everything necessary to help them.

You’re not alone

If you’re not an insurance expert, you’re not alone. This is where your insurance broker comes in – they are your advocate to the insurance companies, working to make sure you get the right coverages at the best prices. If you don’t have a broker or want to make sure you’re getting the most for your money, we invite you to get a free assessment of your organization’s needs from CalNonprofits Insurance Services (license number 0827761.) Visit us at www.calnonprofitsinsurance.org and click “Request an Analysis.”

New & Improved Online Resources

In 2018 we worked to improve the resources available to nonprofits on our website and we’re pleased to share the results! Under the “Resources” tab, you can now find:

• Insurance information
• How to Start a California Nonprofit Guide
• Nonprofit Compliance Checklist
• Recordings of CalNonprofits webinars on insurance, legal issues, compliance topics, policy, government contracting, and more (Free for members!)
• Professional Directory of consultants and businesses who support nonprofits including lawyers, CPA firms, fundraising experts, and more
• California Nonprofit Job Board where members can post open positions for half price
Roller Coaster Year for Nonprofit Student Debt

Our Nonprofit Student Debt project saw many highs and lows this year for nonprofit staff who struggle with student debt.

First, the good news! Despite problems with the implementation of the Public Service Loan Forgiveness (PSLF) program, nonprofit staff have started to see their loans forgiven. Bad news: sadly only 1% of the 28,000 people who applied for forgiveness in 2018 were deemed qualified. There are several possible reasons, including borrowers who mistakenly believed they qualified, but it’s also likely that qualified applications were improperly denied. Congress is currently exploring ways to pressure the Department of Education for more information about these denials and to improve implementation.

CalNonprofits is staying on the case to fight these rejections.

Also good news: largely due to the PSLF Coalition – of which CalNonprofits is a member – Congress passed a technical fix last year called Temporary Expanded PSLF (TEPSLF) that appropriated money for borrowers who were on the wrong repayment plan for some of the 10 years but otherwise met all the criteria for forgiveness. As an example, our staff member Christina Dragonetti paid for five years on repayment plans that did not qualify for PSLF but may be able to get credit for those payments as a result of this fix. Unfortunately the pool of money is limited, and so far, only a few people who applied have received forgiveness through TEPSLF.

In California, a new nonprofit called the Student Borrower Protection Center was started by Seth Frotman – a former regulator at the Consumer Financial Protection Bureau who publicly resigned from the CFPB in protest over the recent rollback of programs designed to protect borrowers. They are working to introduce a Borrower Bill of Rights in California and we’re currently exploring ways to team up with them on this initiative. We’re also working with a social enterprise called Summer that is developing online tools to make it easier for nonprofit staff to see if they’re eligible for PSLF and to get their paperwork filed properly.

Don’t forget: 160,000 nonprofit staff in California have student debt. The Public Service Loan Forgiveness Program is available to almost all of them. To learn more, check out the Nonprofit Student Debt Project page on our website, and contact Project Manager Christina Dragonetti at christinad@calnonprofits.org or 415-926-0668.

HELPING NONPROFITS STAY COMPLAINT

Have you ever wished for a better way to keep track of your nonprofit’s compliance responsibilities every year? You’re not alone. That’s why CalNonprofits worked with the California Attorney General’s office to build a comprehensive checklist to help nonprofit 501(c)(3) organizations – charities – keep up-to-date with annual filing requirements. Fully revised in 2018, the checklist can be found on our website: calnonprofits.org/resources/nonprofit-compliance-checklist.

Funders

Our most important funders are CalNonprofits members whose annual dues allow us to focus on advocating for policies that support our organizations and our communities.

In addition, we especially value those foundations that provide unrestricted support, whose funding supports every aspect of our work:

- David & Lucile Packard Foundation
- James Irvine Foundation
- The California Wellness Foundation
- Weingart Foundation

Funders supporting specific programs

- Fidelity Charitable Trustees’ Initiative
- Southern California Edison

Sustaining Members 2018

Sustaining members go above and beyond to provide additional support for our advocacy work.

- California Community Foundation
- Humboldt Area Foundation
- Josephine S. Gumbiner Foundation
- Provident Credit Union
- S.H. Cowell Foundation
- Valic
- Walter and Elise Haas Fund
- Weingart Foundation

Welcome New CalNonprofits Members!

A Hopeful Encounter, Inc
Alicia Burt
All Students Matter
Australian Theatre Company
Chinatown Fresno Foundation
Door to Hope/MCSFart
Extraordinary Families
Fools Mission
Fostering Media Connections
Glad To Be Here Inc
Healthier Kids Foundation
Hebrew Free Loan Association
Incorrupto
Institute of Buddhist Studies
Kate Wolovsky
Kathryn Meola
Kingdom Causes Bellflower
Koya Leadership Partners
Legal Aid Foundation of Los Angeles
Local Government Commission
MILPA
Oakland Catholic Worker
Open Medicine Foundation
Operation WEBS Women
Empowered Build Strong
People for Clean Water
San Marino Schools Foundation
Simplify Your Biz
Sowing Love Ministries
Speak UP
Tenderloin Neighborhood Development Corporation (TNDC)
The Keith Campbell Foundation for the Environment
The LIME Foundation
Thrive in Joy Nick Fagnano Foundation
Todd Aldrich
Ubuntu Institute of Learning
Uniquely Abled Project
United Way of Stanislaus County
Venice Arts
VIN Foundation
Wage Justice Center

CalNonprofits Members!

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Uniquely Abled Project
United Way of Stanislaus County
Venice Arts
VIN Foundation
Wage Justice Center
Bookkeeping & Accounting Services for California Nonprofits

Proud to support, strengthen, and build the California nonprofit community

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Phone: (888) 427-5222

Everywhere via the web:
calnonprofits.org
In October 2018, more than 300 nonprofit leaders joined CalNonprofits at our Policy Convention: “Nonprofits Standing up for California,” to discuss a wide range of issues impacting our organizations and communities.

Attorney General Xavier Becerra opened the Convention by appreciating the work of nonprofits and the vital role we play in our state.

Tamika Butler challenged attendees to be accomplices - more than allies - in dismantling privilege and systemic racism.

Blogger and humorist Vu Le wrapped up the day with this message: “It’s time to acknowledge and own our power - things are getting urgent.”

Assemblymember Monique Limon (center) joined us for lunch, and to present an Assembly Resolution commending CalNonprofits for the work we do as the voice for California’s nonprofits to CEO Jan Masaoka.

At the end of the day everyone celebrated with sweet treats at the build-your-own-sundae bar.
On June 6th, 2018 nearly 100 state senators and assemblymembers selected nonprofits in their districts for the honor on Nonprofit of the Year, and more than 400 legislators and nonprofit leaders attended a sold-out awards luncheon where nonprofit leaders connected with their elected officials.
Your nonprofit is doing great work!

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For over 28 years, ITS has specialized in providing and managing technology solutions allowing nonprofits to focus on running the business. We provide the peace of mind that the technology required to run the business will work the way you want it to and make the office more efficient. As an added benefit, ITS is an approved provider of the California Teleconnect and E-Rate funds.

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909.392.2334
CalNonprofits Finances 2018

STATEMENT OF ACTIVITIES
Year Ended December 31, 2018
Estimated - Pre-audit

Revenue and Support
- Memberships: 457,712
- Grants and Contributions: 183,236
- Advertising: 3,350
- Conferences and workshops: 71,144
- Honoraria and Consulting: 6,300
- Royalties: 28,885
- Interest Income and Other: 5,939
- Earnings from Wholly-Owned subsidiary: 482,000
- Net assets released from restriction: 0
Total Revenue and Support: 1,285,154

Expenses
- Program Services: 944,672
- Management and Administrative: 184,630
- Fundraising: 3,398
Total Expenses: 1,132,700

Change in Net Assets: 105,866
- Net Assets - Beginning of Year: 4,041,182
- Net Assets - End of Year: 4,147,048

STATEMENT OF FINANCIAL POSITION
Estimated Pre-audit at December 31, 2018

Assets
- Cash and Cash Equivalents: 819,436
- Accounts Receivable: 4811
- Grants Receivable: 52,537
- Dividend Receivable from Subsidiary: 270,000
- Investment in Subsidiary: 3,024,132
- Property and Equipment (Net): 0
- Prepaid Expenses and Deposits: 11,430
Total Assets: 4,182,166

Liabilities & Net Assets
- Accounts Payable: 13,901
- Accounts Payable to Wholly-Owned Subsidiary: 5,675
- Accrued Liabilities: 0
- Accrued Vacation: 19,290
- Deferred Revenue: 5,000
Total Liabilities: 43,866

Net Assets
- Unrestricted Net Assets: 1,023,929
- Investment in Wholly-Owned Subsidiary: 3,024,132
- Temporarily Restricted Assets: 90,239
Total Net Assets: 4,138,300

Total Liabilities & Net Assets: 4,182,166

Where in the State are CalNonprofits Members?

- Far North: 7.1%
- Bay Area: 35%
- Sacramento: 7.9%
- Sierra: 18.5%
- San Joaquin: 6.6%
- Los Angeles: 6.6%
- San Diego: 4.1%
- Orange: 6.6%
- Inland Empire: 6.6%
- Central Coast: 8.7%
- Central: 7.9%
- Los Angeles: 6.6%
- San Diego: 4.1%
- Orange: 6.6%
- Inland Empire: 6.6%
- Central Coast: 8.7%
- Central: 7.9%
- Los Angeles: 6.6%
- San Diego: 4.1%
- Orange: 6.6%
- Inland Empire: 6.6%
- Central Coast: 8.7%
- Central: 7.9%
- Los Angeles: 6.6%
- San Diego: 4.1%
Why do nonprofits join CalNonprofits?

+ Connect to the wider nonprofit community
+ Strengthen the voice of nonprofits in California
+ Participate in advocacy
+ Get health insurance and other insurance for employees
+ Mitigate risk with liability insurance and exclusive offerings for members only
+ Save money on office supplies, background checks, shipping, and more
+ Use online library of finance, HR, and governance resources
+ Free webinars on compliance and policy issues

More at calnonprofits.org