Strengthening the ecosystem for California’s nonprofits

ANNUAL REPORT TO THE CALIFORNIA NONPROFIT COMMUNITY FOR 2017
Dear Members, Friends, and the California Nonprofit Community:

In many ways, 2017 was a year of turbulence and hardship for nonprofits and the communities in which we work, and in whose interests we raise our voices. We are proud to be part of a California nonprofit community that stands up for all Californians.

If you are reading this, you are a CalNonprofits member, someone who's joined us to advocate, made use of a resource like our Compliance Checklist, shared your perspective in one of our surveys, or perhaps even criticized us. In short, you are part of the community to which we hold ourselves accountable: members, partners, and stakeholders.

Two of the ways we helped California's nonprofit community “get to the table” in 2017:

- Together we stalled a dangerous bill – AB 1250 – that would have sharply limited the ability of counties to fund the work of nonprofits in disabilities, in conservation, in healthcare, in animal welfare, in schools, and many other areas. Through an intense collaboration of advocates in Sacramento and a vigorous statewide grassroots response including meetings, phone calls, and letters, we raised awareness about the vital role nonprofits play in local communities, put the brakes on a bad bill, and woke up Sacramento to the power of nonprofits.

- After decades of overlooking the nonprofit sector, the California Legislature created a platform to work together better: the new Assembly Select Committee on the Nonprofit Sector. The committee chair and members are long-time nonprofit champions, many of whom worked in our sector prior to public office. The Committee held two hearings in 2017 and we are planning town halls and hearings for 2018.

And we are especially proud of our work nurturing the ecosystem in which nonprofits can thrive:

- The Nonprofit Overhead Project combined advocacy with education – workshops and webinars reaching over 400 nonprofits. In Sacramento and with selected county governments our research supported the push for fairer indirect cost rates in government contracts with nonprofits. And we advocated with the foundation community for grants that pay the full costs of a funded program.

- We continue to support nonprofit staff with a focus on employees with student debt. Our research, forums, webinars, and policy work inform employees about their options; help employers to better retain a diverse and skilled staff; and inform legislators about the importance of the Public Service Loan Forgiveness Program. If you haven’t already, download our Nonprofit Student Debt Toolkit; it’s an excellent resource for employees and managers.

Nonprofits need insurance and we’re proud that our social enterprise – CalNonprofits Insurance – grew in 2017 to provide health insurance to more than 26,000 nonprofit staff and insurance of all kinds to more than 1,000 nonprofits.

We hope you enjoy reading this Annual Report. We look forward to your comments on it, and to working with you and for you in 2018.

Jan Masaoka, CEO  Geoff Green, Chair, Board of Directors  janm@calnonprofits.org  Geoff Green, Chair, Board of Directors  CEO, Santa Barbara City College Foundation
Welcome New CalNonprofits Members from the Fall and Winter of 2017

Amador Senior Center  Living Desert Zoo and Gardens  Los Angeles Latino Chamber of Commerce
America’s Homeless Veterans  LVDI International Inc  Magidov CPA Firm
Antioch University Los Angeles  Mammoth Lakes Foundation  Med4OurWorld, Inc
Art Without Limits  Mendocino Area Parks Association  Monterey County Symphony Association
ART2EDU  Monterey County Theatre Alliance  Murphy’s School of Music
Bio-Link Depot, Inc.  My Sister’s Keeper Success Institute, Inc.  Nile Sisters Development Initiative
Blue Sky Center  Open California  Point Lobos Foundation
Bridge Foundry, Inc.  Pocketful of Hearts  Ravenswood Education Foundation
California Budget & Policy Center  San Diego Nonprofit Association  Sari Karel
California Child Care Resource & Referral Network  San Diego Zoo Global  Screenfest Horror Film Festival
California Council for the Social Studies  Sari Karel Foundation  SevaChild International
California Green Academy  Screenwest Film & Television  Shoes4feet
Center for Carbon Removal  Signature Bank  Software Simplified
Center for Third World  Solid Rock Community Services  Southern California Outrigger
Organizing  Southern California Goodwill  Racing Association
Central Valley Partnership  The Friends of EXPO Center  Southern Oregon Goodwill
Community Alliance with Family Farmers  The Rescue Team, Inc.  The Sports Center, Inc.
David Sacarelos  The Western Oregon University  The Rescue Team, Inc.
Dord MediaWorks, Inc  Willamette Art Center  The Rescue Team, Inc.
Emerging Arts Professionals San  Willamette Art Center  The Rescue Team, Inc.
Francisco / Bay Area  Windham School  The Rescue Team, Inc.
Entrenous Youth Empowerment Services  Women On The Move  The Rescue Team, Inc.
Escondido Creek Conservancy  You Are Enough  The Rescue Team, Inc.
Esperance Apprentice  Youth Alliance  The Rescue Team, Inc.
Family Connections  Youth Alliance  The Rescue Team, Inc.
Family Service Counseling &  Youth Alliance  The Rescue Team, Inc.
Community Resource Center  Youth Alliance  The Rescue Team, Inc.
GearUp Robotics  Youth Alliance  The Rescue Team, Inc.
Golden State Environmental  Youth Alliance  The Rescue Team, Inc.
Justice Alliance  Youth Alliance  The Rescue Team, Inc.
GVNG.org  Youth Alliance  The Rescue Team, Inc.
Harbor Youth  Youth Alliance  The Rescue Team, Inc.
Harvey Chess  Youth Alliance  The Rescue Team, Inc.
Heroes Warehouse  Youth Alliance  The Rescue Team, Inc.
Huckleberry Youth Programs  Youth Alliance  The Rescue Team, Inc.
International Funders for  Youth Alliance  The Rescue Team, Inc.
Indigenous Peoples  Youth Alliance  The Rescue Team, Inc.
Jennifer Curtis  Youth Alliance  The Rescue Team, Inc.
Jewish Family Service of San Diego  Youth Alliance  The Rescue Team, Inc.
Judy Silk  Youth Alliance  The Rescue Team, Inc.
Lady Freethinker  Youth Alliance  The Rescue Team, Inc.
Leticia Quizon  Youth Alliance  The Rescue Team, Inc.
Library Foundation of  Youth Alliance  The Rescue Team, Inc.
Los Angeles  Youth Alliance  The Rescue Team, Inc.
Weingart Foundation*  Youth Alliance  The Rescue Team, Inc.
* We are especially grateful to these funders that have provided unrestricted support, which, along with membership dues and earned income, gives us the ability to respond quickly and strongly to urgent policy and nonprofit structural issues as they emerge.

California Community Foundation  Blue Shield of California Foundation
California Council for the Social  California Community Foundation  Evelyn & Walter Haas, Jr. Fund
Policy  Children’s Defense Foundation  Humboldt Area Foundation
Center  Charles Stewart Mott Foundation  Josephine S. Gumbiner Foundation
California Green Academy  Provident Credit Union
California Child Care Resource &  S.H. Cowell Foundation  Weingart Foundation
Referral Network  The California Wellness Foundation
California Council for the Social  Vallejo
Studies  Walter & Elise Haas Fund
Center for Carbon Removal  Weingart Foundation
Center for Third World Organizing  Weingart Foundation
Central Valley Partnership  Western Association of Educational Opportunity Personnel
Community Alliance with Family Farmers  Wounded Warrior Homes
David Sacarelos  You Are Enough
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Emerging Arts Professionals San Francisco / Bay Area  Youth Forward
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Leticia Quizon  Youth Alliance
Library Foundation of Los Angeles  Youth Alliance

CalNonprofits Members Inform Our Work

CalNonprofits members work in communities throughout California on a range of issues. Their perspectives and feedback inform our policy and advocacy agenda, and their annual dues are a significant source of support for our work.

Last year CalNonprofits members:

- Joined the Nonprofit CFO Task Force to help guide our Nonprofit Overhead Project
- Served on our Nonprofit Student Debt Task Force, shaping our policy stances and advocating directly with our elected representatives
- Ran for the CalNonprofits board of directors and voted in the election
- Obtained health, dental, and vision insurance available exclusively to CalNonprofits members
- As members of the California Teleconnect Task Force, showed up and advocated during a protracted rulemaking process that resulted in some important victories for nonprofits
- Took advantage of discounts available only to members such as Office Depot, the CalNonprofits job board, discounted background checks, and more
- Used their free access to HR360.com’s library of HR forms and advice

All nonprofits in California can subscribe to our e-newsletters and participate in advocacy campaigns. But only paying members are eligible for participation in the above.

Want to learn more about the benefits of being a CalNonprofits Member?

Contact Christina Dragonetti, our Membership and Marketing Manager: 415-926-0668 or christinad@calnonprofits.org or visit www.calnonprofits.org/membership.

Welcome New CalNonprofits Members from the Fall and Winter of 2017

Amador Senior Center  Living Desert Zoo and Gardens  Los Angeles Latino Chamber of Commerce
America’s Homeless Veterans  LVDI International Inc  Magidov CPA Firm
Antioch University Los Angeles  Mammoth Lakes Foundation  Med4OurWorld, Inc
Art Without Limits  Mendocino Area Parks Association  Monterey County Symphony Association
ART2EDU  Monterey County Theatre Alliance  Murphy’s School of Music
Bio-Link Depot, Inc.  My Sister’s Keeper Success Institute, Inc.  Nile Sisters Development Initiative
Blue Sky Center  Open California  Point Lobos Foundation
Bridge Foundry, Inc.  Pocketful of Hearts  Ravenswood Education Foundation
California Budget & Policy Center  San Diego Nonprofit Association  Sari Karel
California Child Care Resource & Referral Network  San Diego Zoo Global  Screenfest Horror Film Festival
California Council for the Social Studies  Sari Karel Foundation  SevaChild International
California Green Academy  Screenwest Film & Television  Shoes4feet
Center for Carbon Removal  Signature Bank  Software Simplified
Center for Third World Organizing  Solid Rock Community Services  Southern California Outrigger Racing Association
Central Valley Partnership  Southern Oregon Goodwill  The Friends of EXPO Center
Community Alliance with Family Farmers  The Rescue Team, Inc.  The Sports Center, Inc.
David Sacarelos  Willamette Art Center  The Rescue Team, Inc.
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Center for Carbon Removal  Western Association of Educational Opportunity Personnel
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On Wednesday, June 28, 2017, the California Association of Nonprofits hosted the second annual California Nonprofits Day celebration in Sacramento. Senators and Assemblymembers honored almost 100 nonprofits who work in their districts as “Nonprofits of the Year.” Nonprofit leaders and elected officials shared with us their appreciation for this opportunity to develop and strengthen their relationships. A full list of the awardees is available on our website at www.calnonprofits.org/programs/california-nonprofits-day.

“We are all beneficiaries of the nonprofit community as well as part of it.”
— Jan Masaoka, CEO, CalNonprofits

“You can believe that when you take on that battle, we’ll do everything we can with the tools I have to have your back. That is my commitment to you.”
— CA Attorney General Xavier Becerra

It’s such an honor to recognize Heroes Warehouse as the 2017 #SD20 Nonprofit of the Year! #Veterans #CalNonprofitsDay #NonprofitOfYear
— Senator Leyva

Heroes Warehouse representatives Lori Molter, Martin Daly, Mary Kelly-Mohr and Glenn Loveless III accept award from Senator Connie Leyva.

CalNonprofits Policy Director Nancy Berlin, CEO Jan Masaoka, Chair of the Assembly Select Committee on Nonprofits, Assemblymember Monique Limón, and CalNonprofits Sacramento Advocate Jennifer Fearing.
Stay tuned for details about the 2018 California Nonprofits Day event, scheduled for June 6th!
SACRAMENTO UPDATE

A Year of Question Marks, Cliffhangers, and Victories

As part of our work strengthening California’s ecosystem for nonprofits, CalNonprofits monitors and advocates on legislation that could impact the nonprofit community. For example, Assembly Bill 1250, introduced in 2017, represented a serious threat to vulnerable communities across the state because it tried to create new, onerous contracting requirements on nonprofits serving those communities.

After it was introduced, CalNonprofits mobilized more than 300 nonprofits to oppose it. Nonprofit leaders met, called, and emailed their legislators to share their concerns with the bill. After hearing from CalNonprofits and our allies (counties also opposed it) the Senate pushed the pause button on AB 1250. This victory demonstrated the collective and growing power of nonprofits joining together to advocate in Sacramento. We continue to monitor AB 1250 because it could re-emerge in 2018.

CalNonprofits monitored and weighed in on dozens of other bills impacting nonprofits, ranging from student debt to voting access to food donation legislation. CalNonprofits also played an active role in the Teleconnect Fund rulemaking process during 2017. Along with our partners, we advocated for straightforward eligibility rules and a simple application process for nonprofits. While we were disappointed with the final rules, it could have been far worse if CalNonprofits and our partners had not injected the nonprofit perspective into this process. During 2018, we will share how the new rules could impact nonprofits’ telephone and internet bills.

As the 2018 legislative season heats up, CalNonprofits is on the lookout for opportunities to strengthen the nonprofit community, and for problematic bills (like AB 1250) that would harm nonprofits and the communities we work in. Charitable raffles are another issue for 2018, along with student debt, taxes, and funding.

“... Salena Copeland, Executive Director of Legal Aid Association of California

More than 300 nonprofits joined with CalNonprofits to weigh in against AB 1250
New Assembly Select Committee on the Nonprofit Sector

We’re proud of the role we played in launching the first-ever Assembly Select Committee on the Nonprofit Sector. Longtime nonprofit friend Assemblymember Monique Limón (Santa Barbara) was appointed to serve as the chair, and this committee will be a big boost to improving the economic and regulatory climate for nonprofits in California.

The committee’s first hearing focused on the significant economic impact nonprofits have on our state’s economy; oversight at the state and federal levels; and how governments, nonprofits, and philanthropy partner to serve communities. Jan Masaoka, CEO of CalNonprofits, and Shamus Roller, Executive Director of the National Housing Law Project – and a CalNonprofits board member – both spoke at this hearing. At a second hearing in December, the Committee focused on student debt and the challenges it creates for nonprofit organizations and employees.

CalNonprofits is grateful for the Assembly’s leadership in forming this new Select Committee and for such engaging participation by legislators and nonprofit leaders. We look forward to continuing our partnership.

MEMBERS OF THE ASSEMBLY SELECT COMMITTEE ON THE NONPROFIT SECTOR:
Chair Monique Limón (Santa Barbara)
Catharine B. Baker (Dublin)
Marc Berman (Palo Alto)
Anna M. Caballero (Salinas)
Laura Friedman (Glendale)
Mike A. Gipson (Carson)
Timothy S. Grayson (Concord)
Ash Kalra (San Jose)
Brian Maienschein (San Diego)
Philip Y. Ting (San Francisco)

STUDENT DEBT IN THE NONPROFIT COMMUNITY

Doing Something About It

An estimated 180,000 nonprofit employees in California have student debt, with one out of five respondents in our recent survey reporting they had student debt of $90,000 or more. This debt is not just an individual problem; it is a barrier to entry for working in the nonprofit sector and can force staff to leave. Student debt hurts nonprofits’ ability to recruit and retain first-generation graduates and people of color, contributing to the problematic lack of diversity in the nonprofit workforce.

One solution every nonprofit employee and manager needs to know about is the federal Public Service Loan Forgiveness program (PSLF) that forgives student loan debt for full time public sector employees after they make 120 payments on a qualified repayment plan. Helping employees – with free and low-cost solutions – is a simple way nonprofits can support their workforce. PSLF and other strategies are included in our Student Debt Toolkit for Nonprofits – one of the most popular resources on our website.

Like all of our initiatives, the Nonprofit Student Debt Project includes both policy and educational aspects. We support federal and state bills, and helped to pass Assembly Bill 461, enacted in 2017. Because of AB 461, when student debt is forgiven, the state of California will no longer view it as “taxable income.” This is a big burden lifted from borrowers!

“There’s a real multiplier there if you connect students with resources. You reduce the need for getting out of debt later on if you can avoid it in the first place.”

— Assemblymember Laura Friedman (Glendale), speaking at hearing on nonprofit employees and student debt held by the Assembly Select Committee on Nonprofits in December 2017.
New federal policies and proposals created challenges for communities throughout our state, and CalNonprofits helped nonprofits meet these challenges head on.

In the spring of 2017, we surveyed our members to learn about their responses to the new Trump administration and more than 800 people weighed in. While a handful of respondents were positive about the new administration, hundreds of other respondents expressed concerns, for example, about clients who were newly afraid to access services and were going “underground.” Nearly two-thirds of respondents reported “increased levels of staff anxiety or concern,” and 42% said they were increasing their public policy advocacy.

In our October follow-up survey, 58% of respondents reported being “very worried” about the people they work with, an 11% increase from our March survey. We coined the phrase, “Sword, Shield, Bouquet, or Umbrella?” to reflect the various stances nonprofits are taking in response to this administration.

These surveys have been a powerful tool for our advocacy work, confirmed for our members that their experiences and concerns weren’t happening in isolation, and shined a light on an important but overlooked role nonprofits are playing during this challenging time.

Shortly after taking office, the president issued an executive order to stop sanctuary cities from receiving federal funds. CalNonprofits joined an amicus brief supporting an injunction to stop this executive order and in April 2017 a federal judge granted a preliminary injunction and then granted a permanent one in November 2017, finding the executive order to be unconstitutional.

We also spoke out against federal attempts to weaken the Johnson Amendment, which keeps partisan politics away from nonprofits. We sponsored a webinar, wrote a joint letter with the California Council of Churches to our members of Congress, and co-authored an Op-Ed in the Fresno Bee. We were relieved after a provision weakening the Johnson Amendment was not included in the final tax law, though it could return at a later date. CalNonprofits will continue opposing any effort to weaken or eliminate the Johnson Amendment.

We couldn’t have done our work without the many hundreds of nonprofit leaders who educated their communities and spoke to their elected officials about these important issues. With your help, we look forward to increasing our advocacy power and impact this year!
Your nonprofit is doing great work!
So why is fundraising so tough?

Inspiring people to care about your work at an emotional level makes them more generous. Start 2018 off right by developing your own Video Fundraising Strategy. Fundraise like a pro!

Contact Creative Director Steve Dorst for a free Video Fundraising Strategy consult
steve@dorstmediaworks.com
ADLER & COLVIN

Working with nonprofits isn’t something we do on the side. It’s all we do.

For more than 35 years our focus has been and continues to be the legal needs of the nonprofit and philanthropic sectors.

www.adlercolvin.com www.nonprofitlawmatters.com (415) 421-7555
NONPROFIT OVERHEAD PROJECT

Our Initiative to Help Support Nonprofit Sustainability

Funders (including the government) who aren’t willing to pay the full costs of programs is a longstanding problem for nonprofits. A funder might pay for direct costs like meals for seniors but won’t pay for the indirect costs like the staff cooking the meal or the space where the meal is served.

Fortunately, recent Guidance from the Office of Management and Budget created an opportunity for CalNonprofits to engage nonprofits, foundations, and local, state, and county governments on this issue through our Nonprofit Overhead Project. With about one-third of nonprofit revenue coming from the government, even small improvements will go a long way for nonprofit financial sustainability.

As part of this project, we’ve done more than 25 workshops and in-person meetings, plus 12 webinars involving well over 500 California nonprofit folks, to help nonprofits understand their own indirect costs and to negotiate for better, OMB-compliant rates. We’ve also continued our work to mitigate disparities within the nonprofit community, between urban and rural areas, between communities of color and white communities, and between wealthier and lower income communities.

Our Work on Overhead

• Work with the LA County Chief Executive Office to launch a pilot on simplifying indirect costs for nonprofit contractors
• Workshops with the California State Association of Counties (CSAC) for nonprofits and government officials
• Published research on how county administrators and individual donors think about overhead – including a paper published by ARNOVA
• Created momentum and awareness through the Nonprofit Overhead Toolkit
• Worked with foundations statewide on improved grantmaking practices related to overhead and unrestricted funding

While we are making progress, future federal budget cuts may negatively impact nonprofit contracting. Foundations will have a role to play as well – through making unrestricted grants for operating support – and by making sure program grants cover direct and indirect costs.

Fast Company Names GrantAdvisor As One of the Top 10 Most Innovative Companies in Not-For-Profit sector

In July 2017, CalNonprofits joined with the Minnesota Council of Nonprofits and GreatNonprofits to launch a new website: [www.GrantAdvisor.org](http://www.GrantAdvisor.org). The goal is simple: improve grantmaking by providing feedback to funders, and improve grantseeking by giving Yelp-like tips to other nonprofits. We were honored to learn that less than a year after our launch, Fast Company magazine selected GrantAdvisor as one of the country’s Top 10 Most Innovative Companies in the not-for-profit sector for 2018.

During our pilot phase, the website has been focused on foundations in California and Minnesota. More than 1,200 people have written reviews of foundations; a foundation’s profile becomes public once it has received five reviews. A profile includes both anecdotal reviews as well as quantitative data – for example, how long it takes on average to complete a grant application. Over 150 foundations now have a dedicated contact responding to their reviews – creating more clarity for nonprofits around their priorities and processes.

Please help grow the impact of GrantAdvisor by writing a review (or another review!) and stay tuned for updates as the site continues to gain traction.
Supporting California Nonprofits with the Insurance They Need

We are proud to report that our social enterprise subsidiary, CalNonprofits Insurance, continued growing in 2017, helping more than 1,000 nonprofits obtain health insurance for more than 26,000 staff and to cost-effectively obtain workers comp, D&O, general liability, and other insurance.

Here’s what some of their clients say:

“As a member, I can only say thank you for all the services the organization provides. Top of the list—insurance services… CalNonprofits Insurance did a great job with our health insurance changes and also saves us over $20,000 on our disability insurance.”
—Abdi Soltani, Executive Director of the ACLU of Northern California

“CalNonprofits Insurance Services are very responsive, very patient, and they truly partner with me to help me understand the whole benefits industry a little better, but at the same time are immensely supportive. CalNonprofits Insurance is an extended part of my benefits team.”
—Chi Huynh, Executive Director, Controller, the Center to Promote Health Care Access

As our social enterprise, CalNonprofits Insurance is mandated to put nonprofit interests ahead of profits, and to make sure that we serve nonprofits of all sizes and types with organizations ranging from just a few staff to more than 1,000. As part of this mission, we also sponsor health/dental/vision trusts with unique offerings open exclusively to CalNonprofits members. And by working with CalNonprofits Insurance, clients know that their money is reinvested in the nonprofit sector.
Is it time to shine a light on your nonprofit?

An award-winning, creative collective producing visual stories for the world’s do-gooders.

Give Aaron a call to understand how your nonprofit can use short films to share your mission with a larger audience.

Aaron Weber
Fearless Leader
323.230.7361
aaron@wanderfilms.com

wanderfilms.com
The Nonprofit Collaborative (NP Collaborative) is a network of Southern California-based nonprofit consultants dedicated to serving charitable organizations.

We proudly provide a variety of reliable resources to help your nonprofit organization grow and thrive. When you contract with any one of us, feel confident that the following industry experts collaborate with your best interest and organization at the forefront.

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LET’S CONNECT  
npcollaborative.org
CalNonprofits Finances 2017

STATEMENT OF ACTIVITIES
Year Ended December 31, 2017
Estimated - Pre-audit

Revenue and Support
- Memberships: 455,600
- Grants and Contributions: 340,200
- Conferences and workshops: 19,511
- Speaking Fees: 6,000
- Royalties and Advertising: 25,146
- Interest Income and Other: 15,697
- Earnings from Wholly-Owned subsidiary: 423,000
- Net assets released from restriction: 0
- Total Revenue and Support: 1,285,154

Expenses
- Program Services: 731,448
- Management and Administrative: 182,676
- Fundraising: 3,382
- Total Expenses: 917,506

Change in Net Assets: 367,648
Net Assets - Beginning of Year: 3,726,522
Net Assets - End of Year: 4,094,170

STATEMENT OF FINANCIAL POSITION
Estimated Pre-audit at December 31, 2017

Assets
- Cash and Cash Equivalents: 995,818
- Accounts Receivable: 3,856
- Grants Receivable: 0
- Dividend Receivable from Subsidiary: 221,000
- Investment in Subsidiary: 2,889,933
- Property and Equipment (Net): 0
- Prepaid Expenses and Deposits: 18,137
- Total Assets: 4,128,744

Liabilities & Net Assets
- Accounts Payable: 11,104
- Accounts Payable to Wholly-Owned Subsidiary: 4,707
- Accrued Liabilities: 0
- Accrued Vacation: 8,762
- Deferred Revenue: 10,000
- Total Liabilities: 34,573

Net Assets
- Unrestricted Net Assets: 941,877
- Investment in Wholly-Owned Subsidiary: 2,889,933
- Temporarily Restricted Assets: 262,360
- Total Net Assets: 4,094,170

Total Liabilities & Net Assets: 4,128,744
CalNonprofits
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CalNonprofits
2018 CONVENTION

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2018 CONVENTION
OCTOBER 18, 2018

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