

B. RESPONSE COVER FORM (FORM #2)

Agency name: Catholic Charities of the Diocese of Oakland DBA Catholic Charities of the East Bay

Address: 433 Jefferson Street, Oakland CA 94607

Name and title of authorized agency representative: Kathleen Manis Johnson, Pre-Award Grants Manager

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501(c)3 organization?

Yes X

No: If no, provide name, organization, and contact information of fiscal sponsor: N/A

Proposed Services (please indicate either or both):

☒ Legal Services

☒ Community-Based Education and Support

Signed: Chuck Fernandez, Chuck FERNANDEZ, 11/17/17
Executive Director: Signature, Name and Date

Signed: John Espinoza, JOHN ESPINOZA BOARD CHAIR 11-17-17
Board President: Signature, Name and Date

This Cover Sheet must be completed and signed **in blue ink** by individuals authorized to make the offer to perform the work described. Only one copy with original signatures is required.

NOTE: All communication related to this RFP will be delivered to identified email address.

Date and Time Received by County: _____

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A. Applicant's Proposed Scope(s) of Work

X Legal Services X Community Based Education and Support

B. Application Type

X Joint Application

C. Applicant Agency Overview

Organization's history, years in operation, and years providing services proposed:

Catholic Charities of the Diocese of Oakland, dba Catholic Charities of the East Bay (Catholic Charities) proposes to lead a seven-agency Partnership in Contra Costa County to execute Stand Together CoCo: a seamless array of community education and outreach, rapid response, and legal services – built on the backbone of the 24-hour Stand Together hotline – providing no-cost, culturally competent, community-based support for individuals and families drawn into and those at risk of and/or living in fear of becoming involved with the federal deportation system.

Since 1935, Catholic Charities has been responding to the needs of the most vulnerable members of our community. The agency has a 35+ year proven track record of providing culturally competent immigration legal services in multiple languages, coupled with community education and outreach to support immigrant rights and safety. We are one of the largest providers of immigration legal services in the East Bay and one of only three providers with sites in Contra Costa County. Catholic Charities is deeply embedded in the East Bay community and regularly leads and participates in collaborative immigration-related efforts in partnership with a wide range of legal services providers, community organizations, and public agencies. Our deep expertise, wide geographic reach, and proven leadership capacity, leveraged with the expertise of our partners, uniquely positions Catholic Charities to successfully lead the implementation of Stand Together CoCo in partnership with the County and Office of the Public Defender.

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Organization's current core service array, budget, and organizational departments:

Catholic Charities is one of the East Bay's largest multi-service 501(c)3 agencies. We serve people in need regardless of religious belief, national origin, sexual orientation, or gender identity. Our impact reaches across Alameda and Contra Costa Counties, which comprise the Diocese of Oakland, with services in three clusters: **Welcoming the Stranger:** Immigration Legal Services and Refugee Resettlement; **Healing Trauma:** school- and community-based services for those experiencing violence; training and coaching; and **Fostering Self-Sufficiency:** Adult Education, including ESL and Workforce Development; and Rental Assistance.

For Fiscal Year 2017-18, Catholic Charities' operating budget is \$7,912,886. Our Immigration Legal Services (ILS) budget is \$1.1M. Catholic Charities has extensive experience managing performance-based government contracts, consistently fulfilling or exceeding requirements. Many contracts have been repeatedly renewed, testifying to our performance and fiscal management.

Non-programmatic departments at Catholic Charities include Executive, Administrative (Human Resources, Volunteers, Facilities), Finance, Grants, and Development. The ILS Program Manager reports to the Chief Program Officer who has led services for immigrants and refugees for 20+ years. Since 1980, our Immigration Legal Services (ILS) team has supported immigrant clients with a wide range of legal services, education, and outreach, described in the following sections.

Organization's qualifications as they relate to the proposed scope of services: With offices in Richmond and Concord, frequent collaborations with Contra Costa agencies, and over 35 Catholic parishes with whom to partner for legal screenings, workshops, leadership development, and outreach, Catholic Charities is uniquely positioned to coordinate community outreach

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services countywide and has the programmatic and administrative capacity to lead complex collaborative projects. Catholic Charities therefore proposes to lead the Stand Together CoCo Partnership as **Administrative Lead** as well as the **Community Response and Legal Services Hub Coordinator**. Catholic Charities is also the Partnership's **Community Legal Services Lead Agency in West County**, responsible for connecting the Legal Response Team with the Community Response Team in West County; sharing information about community needs; planning for supports in the region; and closely collaborating on workshops/ presentations, outreach to faith-based groups, and other deliverables. Catholic Charities will lead efforts in West County to provide legal consultations, will collaborate with Oakland Community Organizations to provide in-reach to ICE detainees, and will also provide deportation defense.

Catholic Charities is deeply experienced in both community support and navigation and direct legal representation. Catholic Charities provided 1,536 legal consultations last year, and 45 Know-Your-Rights workshops and informational "*charlas*" reaching 1,250 individuals in the last 7 months, with many more accomplished prior to that date. We have provided technical assistance and training for local CBOs covering topics such as basic immigration concepts, updates on immigration law, DACA eligibility, and immigration consequences of criminal convictions and arrests. Catholic Charities also provides high-quality legal representation to our clients – serving 1,035 clients last year – and our staff possesses a combined total of over 125 years of experience in immigration law. All of our services are distinguished by a uniquely responsive, client-centered case management approach and regularly provide structured and customized referrals to relevant nonprofit and public services. Our agency is an affiliate member of the Catholic Legal Immigration Network, Inc. (CLINIC) and our attorneys are members of the American Immigration Lawyers Association (AILA).

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Provide organizational information for proposed partner, indicate their role in Project:

Founded in 1969, **Centro Legal de La Raza (Centro Legal)** is a comprehensive legal services agency providing bilingual and culturally competent legal representation, education, and advocacy to strengthen low-income, immigrant, and Latino individuals and families. Centro Legal will provide representation on deportation defense cases and technical assistance on cases led by other organizations to build deportation defense capacity more broadly in the County.

Oakland Community Organizations (OCO), the Partnership's **Community Response Lead Agency in West and East County**, has been serving the Oakland community since 1977, and has begun an expansion to Contra Costa and Alameda Counties. OCO has provided immigration support work and advocacy for a pathway to citizenship for undocumented persons since the early 2000s. OCO will lead the Community Response Team in both West and East County, providing hotline and dispatch coordination services in addition to leadership development and Train the Trainer events to their staff and recruited volunteers. OCO will also be responsible for connecting the Community Response Teams to the Community Legal Services Lead Agencies in West County (Catholic Charities) and East County (International Institute of the Bay Area); ensuring seamless connection to services for hotline referrals; completion of regional deliverables such as workshops/presentations; and outreach to community organizations. OCO will also be the lead in West and East County for school district outreach as well as co-leading the provision of in-reach presentations at county jails to ICE detainees.

Founded in 2001 to serve the disproportionate number of low-income immigrants of Concord's Monument Corridor, **Monument Impact (MI)**'s mission is to actively engage Monument Corridor residents in training and tools that promote economic self-sufficiency, health and safety, civic engagement, community connections, and lifelong learning. MI is the

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Partnership's **Community Response Lead Agency in Central County** and will lead the Central County Community Response Teams, providing hotline and dispatch coordination services in Central County and leadership development and Train the Trainer events to their staff and recruited volunteers. MI is also responsible for connecting the Central County Community Response Team to the Community Legal Services Lead Agency in Central County (Jewish Family and Community Services); ensuring seamless connection to services for hotline referrals; completion of regional deliverables such as workshops/presentations; and outreach to community organizations. MI will also be the lead in Central County for school district outreach and support.

Founded in 1877 with a focus on helping vulnerable women, children, and community members, **Jewish Family and Community Services – East Bay (JFCS)** has been serving diverse groups of refugees and immigrants in Contra Costa and Alameda counties for more than 25 years. The agency has been providing naturalization services for several decades and became Board of Immigration Appeals (BIA) recognized in 2012. JFCS is the Partnership's **Community Legal Services Lead Agency in Central County** and is responsible for connecting the Legal Response Team with the Community Response Team in Central County; sharing information about community needs, planning for supports in the region; and closely collaborating on regional activities, such as workshops/presentations, outreach to other faith-based groups, and other deliverables. JFCS will be the lead in Central County on providing legal consultations. JFCS is also one of three agencies providing deportation defense services.

Formed in 1918 with a mission to provide high-quality immigration legal services, education, and civic engagement opportunities to immigrants, refugees, and their families as they join and contribute to the community, **International Institute of the Bay Area (IIBA)** – the Partnership's **Community Legal Services Lead Agency in East County** – has been serving

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low-income immigrant communities in California for 99 years. IIBA is responsible for connecting the Legal Response Team with the Community Response Team in East County; sharing information about community needs; planning for supports in the region; and closely collaborating on regional activities, outreach to faith-based groups, and other deliverables. IIBA will be the lead in Central County on providing legal consultations.

Bay Area Community Resources (BACR) is a non-profit community agency founded in 1976 whose mission is to promote the healthy development of individuals, families and communities in the San Francisco Bay Area. BACR has longstanding experience delivering successful child, youth and family services in Contra Costa County, where they have delivered services for over 25 years. BACR will collaborate with partners on the regional deliverables in East County, with a focus on hotline staffing and outreach to school districts.

Additionally, the Partnership will work closely with the **Diocese of Oakland** in an unfunded capacity. There are 35 parishes in Contra Costa County with the ability to host community workshops, perform outreach, and mobilize volunteers. We will also partner closely with **First 5 Contra Costa**, who have nearly 200 trained parent advocates countywide that can help promote the hotline, assist with community workshops, and serve as a conduit of information to families. Lastly, we will partner with the **Interfaith Movement for Human Integrity** to collaborate on in-reach and support for ICE detainees.

Summarize proposed partners' qualifications as related to the proposed scope of services:

Catholic Charities is a strong leader and advocate in the East Bay Area legal services community, working closely with the Alameda County Immigrant Legal and Education Partnership (ACILEP) – a similar effort to Stand Together CoCo that seeks to respond to the critical need for legal services, know your rights education and rapid response services when

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there is an immigration enforcement action. **Centro Legal** and **OCO** are founding members and current leaders in ACILEP; we are relying on their expertise and experience to make Stand Together CoCo a success.

In addition, all project partners possess deep expertise in their respective scopes of services. **Centro Legal** conducted over 4,000 legal screenings/brief consults and accepted more than 3,000 cases for full scope representation last year, representing clients in detained and non-detained removal defense, asylum applications, family-based visa petitions, U-visas, Special Immigrant Juvenile Status (SIJS), adjustment of status, and naturalization, with expertise in complex detained cases. For decades, **OCO** has provided community organizing, leadership development, and training to residents in Contra Costa and Alameda Counties for citizenship education, Know Your Rights, family preparation planning, and rapid response hotline services for ICE raids for the past two years, reaching over 2,500 people during 2017. **MI** has worked with the immigrant community in Central County for nearly 17 years, providing services and community engagement programs to 5,000+ residents/year including both Train the Trainer and Leadership Development models which will be employed to build community engagement in Stand Together CoCo. **MI** has proven capacity to cultivate leadership in the community, with more than a decade of experience cultivating *promotores* (community promoters) and community leaders. In partnership with **JFCS**, **MI** has offered immigration legal services on site for several years. **JFCS** is a BIA recognized agency with a Spanish-speaking Immigration Attorney and multilingual BIA-accredited representatives, allowing full-scope immigration legal services to be provided in Russian, Farsi/Dari, Spanish, and Arabic. All staff members have deep connections to and perform outreach within the communities they serve. **IIBA** has been providing immigration presentations, workshops and legal consultations for over fifty years.

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IIBA has extensive experience representing clients in thousands of applications for family-based petitions, adjustments of status, and U-Visas as well as experience representing clients with T-Visas, Asylum, and SIJS cases. **BACR** has provided a myriad of community support services throughout the Bay Area for over 40 years, including through the agency's Undocumented Rights Coalition, which serves undocumented and immigrant youth in need of help accessing and navigating legal, education, and workforce services.

D. Technical Expertise:

Expertise in providing proposed services, including direct service, community-based services, and technical assistance and training services: **Direct Service:** Catholic Charities is a BIA recognized organization providing a range of low- and no-cost direct legal services for immigrants, including family-based immigration petitions; domestic violence relief (VAWA Self-petitions); victims of crime relief (U-Visa); services to unaccompanied minors; special immigrant juvenile status (SIJS); Deferred Action for Childhood Arrivals (DACA); temporary protected status (TPS); consular processing; and naturalization, including representation for complex applications and referrals to the East Bay Naturalization Collaborative when appropriate. Our services are provided by multilingual (primarily Spanish-speaking) staff, many of whom are also recent immigrants.

Community-based services: Catholic Charities' ILS team regularly organizes community education and outreach events, providing important information for immigrants and providers that serve them. Topics covered include: Know-Your- Rights, pathways to legal status and citizenship, avoiding fraud, DACA, AB60, the Trust Act, and current legal developments impacting communities. Every two weeks in our Concord office we offer group processing events for naturalization. We also provide presentations and outreach materials on legal

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immigration issues to agencies that work directly with immigrant families in order to build agencies' capacity. Presentations include basic immigration concepts, updates on immigration law, and immigration consequences of criminal convictions and arrests.

Currently, a major focus of Catholic Charities' community education and outreach work is Know-Your-Rights. In today's political atmosphere surrounding undocumented immigrants, refugees, and asylees, these persons have good reasons to fear for their safety and freedom. Our ILS team provides presentations and forums, communicating information on rights under the Constitution, citizenship processes, how to interact with Immigration and Customs Enforcement (ICE) officials, and connections to legal and social services. Presentations are hosted in safe spaces such as parishes, schools, and community centers, helping to ease fears and build trust.

Catholic Charities maintains close relationships with many news outlets, including Univision, Telemundo, San Francisco Chronicle, Oakland Tribune, East Bay Express, San Jose Mercury News, KPIX, and Catholic Voice. We use these media relationships to educate the community and provide information about available resources. Our ILS Program Manager, Maciel Jacques, is regularly featured in local print and televised media and is regarded as a go-to expert by reporters on immigration policy and legal services. She is also part of the Univision Immigration Committee, which meets quarterly to discuss immigration policy and services issues.

Technical Assistance and Training: Catholic Charities has an intentional focus on technical assistance and training, which we provide for other legal services providers, CBOs who serve immigrant communities, public agencies, elected offices, schools and school districts, faith-based communities, and others. We provide in-depth training and technical assistance on immigration policy and the changing immigration landscape, including DACA (now ended), TPS, U-Visas, services to unaccompanied minors, and other important immigration issues impacting our

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communities. We train various entities on the immigration legal services available and how to connect people who need help. We also specifically provide workshops for non-profit service providers and school districts on immigrant rights and what to do in case of ICE encounters.

Experience and expertise of assigned Project staff. Resumes and/or job descriptions:

Catholic Charities will hire a 1.0 FTE Community Response and Legal Services Hub Coordinator who will be bilingual and have expertise in Contra Costa County, immigrant rights and services, and large-scale project management and facilitation. We will also hire a 1.0 FTE Attorney. Qualifications include membership and good standing in the bar of any state or federal territory, California license preferred; law degree from an ABA accredited law school, immigration law experience, and deportation defense experience strongly preferred. Additionally, Catholic Charities will provide 0.25 FTE of Legal Assistant Virginia Ramirez's time in our Richmond office, who has 2 years' experience serving the Richmond community.

Centro Legal's Lisa Knox, Immigration Program Managing Attorney, will fulfill the role of Senior Attorney 1.0 FTE under this contract. She is fluent in Spanish. Before joining Centro Legal, Ms. Knox practiced immigration law at Van Der Hout, Brigagliano & Nightingale where she worked on deportation defense, asylum, and family-based cases. She has also worked on impact litigation relating to immigrants' rights at the Lawyers' Committee for Civil Rights, and as a clinical instructor at the East Bay Community Law Center. Ms. Knox received her J.D. from Columbia Law School. Eleni Wolfe-Roubatis, Centro Legal's Immigration Director with over 10 years of experience, will support Ms. Knox with any technical assistance needed.

JFCS will hire a 1.0 FTE Attorney for this project. Qualifications include membership and good standing in the bar of any state or federal territory, California license preferred; law degree from an ABA accredited law school, bilingual in English and Spanish, immigration law

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experience, and deportation defense experience strongly preferred. Additionally, JFCS will also provide a 0.25 FTE Legal Assistant who is bilingual in English and Spanish.

IIBA's Juan Ortiz, Contra Costa County Program Director and Staff Attorney, will be provided 0.2 FTE on this project. Mr. Ortiz graduated from Whittier Law School in 2010 and was admitted to the California Bar in 2011. He is bilingual Spanish and English and has six years' experience providing immigration legal services as well as training and mentoring accredited representatives. Mr. Ortiz manages IIBA's Antioch office, with duties including supervision, client representation, and community outreach efforts. IIBA will also provide a 0.25 FTE Legal Assistant, who will be responsible for client referrals and workshop coordination.

OCO will hire 2.0 FTE Community Leaders (to lead the East and West County Community Response Teams respectively). Qualifications include bilingual, experience as a community organizer, organizing and managing events, project management skills, facilitation skills, outreach experience, and ability to build community relationships. OCO will also hire four 0.5 FTE Local Responders to staff the Community Response Teams in West and East County, with qualifications in community outreach, coordination, and phone dispatch.

MI will provide 0.4 FTE Community Engagement Manager who will implement leadership development workshops in collaboration with other MI staff. Qualifications include community organizing, developing leaders, supervision, and program management. MI will also hire a 0.75 FTE Community Response Leader and 0.5 FTE Organizer both with experience in organizing, coordination, and community outreach and support. Lastly, MI will hire four 0.175 FTE Local Responders with experience in outreach, coordination, and dispatch.

BACR will hire two 0.5 FTE Local Responders to serve on the East County Community Response Team with qualifications in community outreach, coordination, and dispatch.

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Discuss your expertise and experience as it relates to [prior] collaborative Projects:

Catholic Charities and all Stand Together CoCo partners have extensive experience leading and participating in collaborative large-scale projects with other agencies, including many different configurations of the partner agencies included in this application. Catholic Charities was the lead agency for the Ready Bay Area Collaborative (funded by a consortium of legal funders including Zellerbach and Soda) for two consecutive years, with multiple partners, receiving \$30,000 for our Legal Services Supervisor, with the support of the entire ILS team, to coordinate workshops for DACA group processing with an emphasis on hard-to-reach populations; coordinate community education and outreach on shifting immigration enforcement and programs; organize information sessions throughout Contra Costa County to inform the community on immigration reform and administrative relief (DACA+ and DAPA) and provide legal consultation with attorneys and accredited representatives, all in collaboration with our partners. While the funding has concluded, this work is ongoing.

Catholic Charities also recently collaborated on a Community Forum in Concord, working with JFCS, MI, and IIBA to organize and provide training on Family Preparedness Planning coupled with legal consultations. Because of this partnership between agencies, the event included 7 lawyers, 8 organizations tabling, and over 60 community members in attendance.

Additionally, Catholic Charities and OCO have worked closely together for years, partnering on Know Your Rights presentations, providing legal consultations, and information tables at OCO events. Catholic Charities recently partnered with OCO and the Diocese of Oakland to organize an Immigration Forum in Pittsburg, which included a Know Your Rights presentation, updates on DACA, TPS, U-Visas, and legal consultations. This took 3 months of planning and included 12 lawyers, 9 organizations tabling, and over 200 community members in attendance.

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OCO and Centro Legal are original ACILEP (Alameda County Immigration Legal & Education Partnership) partners, providing Alameda County communities with rapid response to ICE raids, family preparation planning, attorney referrals and legal clinics, Know Your Rights trainings, and other necessary community services. Catholic Charities, Centro Legal, OCO, JFCS, IIBA and MI are all original CCIRA partners (Contra Costa Immigrant Rights Alliance), partnering to advance immigrant rights and resources for everyone in Contra Costa County.

IIBA was the lead agency and fiscal sponsor for the Bay Area DACA Collaborative, which Catholic Charities and many of the partners also participated in. This was a 10-county effort that raised \$1.7 million over 2.5 years, and supported 25 organizations. As a result of that collaborative effort 55,000 individuals were informed about the potential benefits of DACA and referred to legal services, 17,000 legal consultations were provided, and 9,000 DACA applications were completed.

Challenges with cross-agency collaboratives differ from project to project. Some challenges partners have experienced include maintaining a shared vision throughout the life of the collaborative, as well as ensuring that partnerships are durable from the beginning. We have learned that trusting relationships are important to any collaborative. Shared core values have been important in keeping the group grounded and on track. Seeing the value of all members of the collaborative, from line staff to management, and from community responders to legal experts, as all having an equal role and value ensures a sense of equity across the table.

Describe your agency's experience and capacity related to:

1) monolingual non-English-speaking clients: All of Catholic Charities' direct service ILS staff speak more than one language. Most are Spanish-proficient and many are native speakers. Catholic Charities has over 80 years of experience serving the diverse East Bay community and

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today serves clients from all over the Bay Area and beyond. Catholic Charities leverages our connections in the community and extensive in-house language capacity developed through our ILS and refugee services programs to meet the needs of clients who do not speak English. All community partners will prioritize linguistic and cultural needs when hiring community responders. In-house linguistic/interpretation capacity at partner organizations currently includes: Spanish, Mam, French, Greek, Italian, Portuguese, Ukrainian, Arabic, Farsi/Dari, and Russian. Should there be any language needs the collaborative cannot meet within our respective offices, some partners have 24- hour access to a professional language interpretation phone line.

2) bilingual/bicultural clients: The supports described above for mono-lingual non-English speaking clients are also available to and utilized for bilingual clients. Regarding bicultural clients, we understand that culture is not static and it is important to be constantly learning from our clients about the unique blends of culture and how to most respectfully and comfortably serve clients from diverse and blended cultural backgrounds. In addition, we participate in cultural humility trainings and learning opportunities in order to best serve our clients.

3) trauma-informed practices: Catholic Charities of the East Bay is a nationally recognized expert in trauma-informed practices. Our Healing Trauma programs provide training and technical assistance to a range of service providers in Alameda and Contra Costa Counties on restorative and trauma-informed practices, especially working with victims of community and family violence, institutional racism and the school-to-prison pipeline, and more. Catholic Charities is also uniquely equipped to provide in-house referrals to mental health services for clients needing additional support. Further, the Immigration Legal Services Department works closely with a victim advocate from Concord Police Department to develop a referral network for clients and has received training regarding working with victims of crime. Additionally, all

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Partnership agency staff are also trained in trauma informed practices – e.g. how to identify trauma in clients, how to build sustainable relationships with clients who have experienced significant trauma, and how to manage the vicarious trauma staff members often experience when working with clients who may have suffered traumatic crimes or other events.

4) familiarity with strengths-based and client-directed methods: Catholic Charities is familiar with strengths-based and client-directed methods. All of our services as an agency seek to identify and leverage the strengths of our clients – whether they are seeking employment, healing from trauma, seeking asylum or undergoing the refugee resettlement process, have lost a loved one to homicide, or were trafficked for sex, we identify the core strengths inherent in the person and meet our clients where they are. In our ILS program, clients who seek our help are often experiencing personal hardships or challenges related to and in addition to their immigration legal services needs. Our staff strives to provide a safe, comfortable, and supportive environment where clients have the room and support to determine what action they would like to take, and communicate their stories and needs in the ways that feel most authentic to them in the face of significant personal hardship.

5) culturally responsive and respectful practices: The seven organizations in the Partnership have long-term experience providing culturally responsive and respectful practices. Our staffs are culturally and ethnically diverse, and highly trained in cultural competency. Our clients consistently provide feedback about how they appreciate that our staff are sensitive to specific needs and diverse cultural backgrounds. For example, Centro Legal maintains formal relationships with several technical assistance organizations in the Bay Area, including the Center for Gender and Refugee Studies and Immigrant Legal Resource Center who provide trainings to staff on substantive immigration law and practical trainings on working with

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vulnerable populations, including women and children, and JFCS receives annual training on cross-cultural communication issues and working with refugees and immigrants who have suffered trauma.

Experience with and relationships to various immigrant populations in Contra Costa and how these relationships correspond to the County's regional population distribution?

The proposed Partnership will provide services Countywide with a special focus on densely populated areas with high immigrant concentrations – but also with outreach to more rural and underserved areas. The largest areas in Contra Costa County by population are Concord, Richmond, and Antioch.¹ In Concord, 23.4% of residents are foreign-born, similar to the overall county rate of 23.9%; and 21% of Concord residents are Latino/Hispanic.² In Richmond, foreign-born residents make up 25.8% of the overall population, with 39.5% of the population identified as Latino/Hispanic compared to 25% for the county overall.³ In Antioch, 13.2% of the population is foreign-born and 22.1% is Latino/Hispanic;⁴ while in Pittsburg 24.8% of the population is foreign-born and 32% is Latino/Hispanic.⁵

The Partnership will leverage participating agencies' existing relationships with immigrant populations to increase outreach, coordination, and effectiveness of services and create a community-led rapid response network. **Catholic Charities** has longstanding relationships with immigrant populations in West and Central Contra Costa County through our service centers located in Richmond and Concord respectively. Our offices serve diverse clients that represent the local community population characteristics, and majority are Latino/a. However, we also

¹ <https://datausa.io/profile/geo/contra-costa-county-ca/>

² <http://www.bayareacensus.ca.gov/cities/Concord.htm>

³ <https://www.ci.richmond.ca.us/DocumentCenter/Home/View/8348>

⁴ <http://www.bayareacensus.ca.gov/cities/Antioch.htm>

⁵ <https://datausa.io/profile/geo/pittsburg-ca/>

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have seen an increase of African, Pacific Islander, Asian, and Middle Eastern clients. **Centro Legal** specializes in serving monolingual Spanish speaking communities and also houses a part-time Spanish/Mam interpreter for Guatemalan clients. In 2015, Centro Legal represented 214 Contra Costa residents; and in 2016, 220. The agency's attorneys and legal support staff conduct consults and intakes twice a month at the West County Detention Facility. In addition, 10% of calls on the ACILEP hotline come in from residents of Contra Costa. **OCO's** clients will be primarily Spanish-speaking residents, with whom the agency maintains strong relationships, as well as Asian communities and Muslim Arabic speakers. While OCO has historically served the Oakland community, the agency is currently bringing its unique model of leveraging the strength of the local communities and organizations, including faith communities, to provide leadership development, outreach, education, and technical assistance in the Contra Costa Community.

Historically, **MI** has predominantly served the Latino community of Central County and has longstanding relationships the residents there. MI works to empower leadership in the community, particularly in Concord's Monument Corridor, where a disproportionate 43% percent of people are foreign-born⁶. **JFCS'** clients will include Spanish speaking residents of Central County, and also has the capacity to serve clients in Arabic, Russian, and Farsi/Dari. During this past year, JFCS has provided legal representation for 209 Latino clients, all of whom were residents of Contra Costa County. A majority of those clients (120) live in Concord. **IIBA** serves East County, helping documented and undocumented immigrants and their family members residing in the following cities, some rural and underserved: Bay Point, Pittsburg, Antioch, Oakley, and Brentwood. **BACR** has primarily served children, youth and their parents in East County via their teen and young adult programs. About 10% have been undocumented.

⁶ https://iurd.berkeley.edu/uploads/Concord_Final.pdf

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BACR runs all elementary after school programs in Antioch, where the agency serves hundreds of children and their parents, the majority of whom are immigrants, many undocumented.

Data-management capacity & experience especially in multi-partner projects:

Catholic Charities is highly experienced in data management for legal services, especially in multi-partner projects. For instance, as a part of the Ready Bay Area collaborative, Catholic Charities participated in a data reporting spreadsheet tool developed by the funder, which included both quantitative and qualitative reporting. We kept detailed records and metrics on the number of clients, the number of cases, types of cases, their outcomes, and other data.

Catholic Charities uses INSZoom, an industry standard online case management system, to efficiently document and track client visits, the number of clients served, services provided, application outcomes, case notes, and outreach activities. INSZoom facilitates case coordination, case supervision, quality control, and reporting capabilities. Key demographic INSZoom data is inputted in our agency-wide Salesforce database, where it is utilized to analyze trends in service, summarize outcomes for the department and agency, contribute to program planning, and improve quality.

Catholic Charities' databases are managed by our Director of Data Analytics and Quality Assurance, who leads our agency in continuous quality improvement.

Experience in managing confidential information, information gathering & sharing protocols.

Catholic Charities is accredited by the Council on Accreditation and as such adheres to the highest standards of client and data confidentiality. We have agency-wide policies to protect client and data confidentiality which are strictly adhered to by all staff members, and which are included in MOUs with partner agencies with whom we collaborate on gathering or sharing data. Our legal services are bound by California Code of Ethics. Partnership agencies prioritize client

confidentiality as a cornerstone of longstanding service provision in the community.

Partners' capacities & description of why this collaboration is an effective approach.

While there is significant need in Contra Costa County for immigration legal services – especially in today's political climate – the area is underserved. This proposal combines the substantial expertise of the three primary legal providers in the County – Catholic Charities, JFCS, and IIBA – with the expertise and outreach capacity of community-based organizations who are embedded in immigrant communities and/or in the process of expanding Countywide – MI, OCO, and BACR. Additionally, Centro Legal, the primary provider of removal defense legal services, will not only provide direct services under this contract but will also provide training and technical assistance that will allow other agencies to build capacity in Contra Costa, with the goal of amplifying reach and increasing the number of individuals defended in removal proceedings. Services will be provided countywide, with no area being left out.

E. Approach to the Scope

Your approach to accomplishing the activities and deliverables described in this RFP.

Timeline of Our Approach to the Scope: The Stand Together CoCo Partnership will begin its work with a two-month startup phase (January-February 2018), followed by a four-month implementation phase (March-June 2018). The proposed phasing of hiring and activities below is dependent on many factors, most significantly the ability of the partners to staff up quickly with new hires that possess the requisite skills and experience to immediately take on the deliverables assigned to them. At the beginning of the start-up phase, Catholic Charities will host a kickoff meeting with all partners, followed by weekly planning and collaboration calls for the duration of the startup phase, followed by bi-weekly calls thereafter. Additionally, Catholic Charities will host every other month in-person meetings with all partners that focus on

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intentional reflection on the quarter's successes and challenges, process quality improvement, and planning for the work upcoming.

In January 2018, our major goals are posting and hiring for all positions that do not start at the beginning of the contract period (the majority of the staff positions that need to be hired for this project will start February 1 including all regional community team positions – community responders and team coordinators – 1.0 FTE attorney hired by JFCS, and 1.0 FTE attorney hired by Catholic Charities). Immediately in January, Community Response Teams in each region will collaborate closely on hotline infrastructure establishment, start-up, testing, and administration, as well as planning for and fulfilling regional deliverables and connecting the Community Response Lead Agency with the Community Legal Services Lead Agency to ensure seamless communication, collaboration, and information-sharing. Additionally in January, the preparation, planning, and in-depth partner coordination begins for the accomplishment of major deliverables, including especially hotline staffing (begins in March), leadership development and training of staff and volunteers (begins in February for staff and April for volunteers), workshops and presentations including in-person and webinar presentations (begins in March), in-reach to county jails (begins in March), legal consultations (begins in March), outreach to the faith-based community (begins in March), outreach to school districts (begins in March), and legal representation (begins in January with Centro Legal taking cases immediately, with additional capacity beginning likely in February).

In February 2018 our goal is to begin the month fully staffed. Regarding deliverables, JFCS's newly hired attorney (1.0 FTE) and Catholic Charities' newly hired attorney (1.0 FTE) will begin taking deportation defense cases provided each agency is able to hire an experienced attorney on this accelerated schedule. Community Response Teams in each region will continue

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to collaborate closely on planning for deliverables and activities. Volunteer recruitment will begin for the leadership councils and peer responders. Leadership development and training begins for Partnership staff members.

In March 2018, the start-up phase ends and our implementation phase begins, with activity beginning on all deliverables that have not already begun: the hotline will be fully staffed and 24-hr operation begins; monthly in-reach presentations to county jails begin; community workshops and presentations begin; provision of consultations to community members begins; outreach to the faith community begins; and outreach to school districts begins. Additionally, volunteer recruitment continues for the leadership councils and peer responders. Leadership development and training continues for Partnership staff members.

In April 2018, Leadership Council meetings begin (with the understanding that recruitment for these councils will likely continue to be ongoing). The initial meeting schedule will be every other month as the project ramps up, with monthly meetings by the end of Year 1. Leadership development and training continues for Partnership staff members and begins for the newly recruited volunteers.

For the remainder of Year 1 (May and June 2018), collaboration, training, implementation, and ramping up of all activities will occur, so that by the end of Year 1, the Partnership has ramped up, is fully staffed and trained, and is ready to meet all expected deliverables and activities at the monthly rates included in the RFP through years 2 and 3.

Deliverables and Activities Roles & Details Included in Our Approach to the Scope:

Hotline Staffing: 24 hour a day 7 days per week staffing of the hotline by paid community response staff as well as a trained volunteer corps will be coordinated by the Community Response Leaders in each region (lead and staffed by OCO in West and East, and

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MI in Central County). Hotline staff will provide Contra Costa County residents who are threatened with deportation or in some way affected by immigration enforcement activity with information, support, and community navigation. When the hotline receives a call that someone has been detained (either just happened, or happened days or weeks ago), the hotline responders will send that information to the attorneys right away so that they can arrange to meet with the person as soon as possible. When a call comes in to report a raid, trained Legal Observers will be dispatched to document and verify. Our response model will be informed by the ACILEP hotline model in Alameda County. Regarding hotline scheduling, each of the Community Response Lead Agencies is responsible for filling 56 hours per week of hotline staffing timeslots. The Partnership will create a detailed coverage schedule and call routing plan based on client need and location.

Leadership Development: The Partnership will hire, train (including leadership development training) and manage Community Response Teams in each region to coordinate dispatch and response activities. The West and East County Community Response Teams and the corresponding leadership development activities will be led and staffed by OCO with MI leading in Central. In East County, BACR will support OCO in leadership development efforts.

Workshops and Presentations: The provision of workshops and presentations in each region (4 per region with 12 total over 6 months, reaching ~45 people per workshop, totaling 540 people reached countywide in 6 months; 24 workshops annually in Years 2 and 3 reaching ~45 each) will be co-led by the Community Response Lead Agency (OCO in West and East with BACR support in East, MI in Central) and the Community Legal Services Lead Agency (Catholic Charities in West, JFCS in Central, IIBA in East) in each region. Additionally, workshop and presentation content, community response, and other resources and information

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will be shared between each regional Community Response Team for the highest quality, most informed services. Lastly, although the RFP requests the livestream of these presentations and workshops, the Partnership agency is concerned that attendees of our presentations are often community members who would not want to attend an event that will be recorded – and safe, convenient community spaces may not be equipped for livestream. Therefore, we propose that the Partnership agencies collaborate on the development, provision, and distribution of a recorded webinar with comprehensive content. Workshops will begin in March; and one presentation will be provided per month per region from March to June, for a total of 12 in person presentations and workshops, plus one online webinar, in year one.

In-Reach to County Jails: Catholic Charities and OCO will partner to lead or coordinate monthly informational presentations for ICE detainees in West County jail, focusing on topics such as due process, immigration processes, and helpful resources. These monthly presentations will begin in March after our two-month start-up period, and will occur monthly from March 2018 on. Our goal will be to reach ~45 people at each presentation in order to fulfill the deliverable of 180 people reached in the first 6 months of the project, and will continue to provide monthly presentations in Years 2 and 3 reaching ~30 people each month.

Legal Consultations: The Community Legal Services Lead Agency in each of the three regions (Catholic Charities in West, JFCS in Central, IIBA in East) will be responsible for 150 consultations provided in their region, for a total of 450 free legal consultations provided to community members of the first 6 months of the grant period (900 annually in Years 2 and 3). Each consultation will advise on legal rights, immigration relief options, and referrals.

Train the Trainer and Leadership Development: The Community Response Lead Agency in each region of the county will be responsible for training their paid and volunteer

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community responders on crucial topics, recruiting members for and leading monthly Local Leadership Council meetings, and coordinating with the Community Response Teams in the other two regions to establish hotline dispatch and response schedules, shifts, and responsibilities. 10+ volunteers will be trained in each of the three regions, in addition to all of the paid staff on County Community Response Teams. A fully staffed and operational hotline will begin in March, leadership development and training of staff and volunteers will begin in February for staff and April for volunteers, and Leadership Council meetings will begin April and will be held every other month until the end of Year 1, after which they be monthly.

Faith-based Outreach: In each region of the county, our Community Response Lead Agency and our Community Legal Services Lead Agency will be partnering to reach out to and provide information to 12 faith-based organizations in the region, for a total of 36 faith-based organizations reached across the county during the first 6 months (72 annually in Years 2 & 3).

School District Outreach: In each region of the county, our Community Response Lead Agency will be responsible for establishing themselves as a single point of contact for local school districts, supporting them with information and resources. In West County, OCO will reach 3-4 school districts. In Central County, MI will reach 3 school districts. In East County, OCO will reach 3 school districts, and BACR will reach 1-2 school districts. School district outreach will begin in March after our two-month start-up period is over. By the end of the first 6 months, we will have reached 10-12 school districts (20-22 annually in Years 2 and 3).

Legal Representation: The 1.0 FTE Sr. Attorney will start taking cases in January, take 15 cases in Year 1, and provide technical assistance to other agencies on 10 more cases. JFCS and Catholic Charities' attorneys (1.0 FTE each) will start February 1, take 30-35 cases between them in Year 1, for a total of 45-50 cases. These Year 1 deliverables are only achievable if we

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are able to quickly hire attorneys experienced in removal defense. If we are not, these deliverables will need to be adjusted to account for a training period. Regardless, by the start of Year 2 the Partnership will have ramped up to take 10 cases per month (120 cases annually in Years 2 and 3).

Proposed approach as it relates to Contra Costa County's regions:

The Stand Together CoCo Partnership proposed in this application will cover the entirety of Contra Costa County. Catholic Charities, as the Administrative Lead on this project and the leader of the Community Response and Legal Services Hub, will have a countywide role coordinating the seamless provision of services across the county as well as close partner collaboration. We feel that it is important to unify the coordination of Community Response and Legal services into one hub for seamless information sharing and service provision. This is also why each region has a designated Community Response Lead Agency and Community Legal Services lead agency, described previously in the proposal as well as below.

Centro Legal will provide countywide services, representing clients as well as providing technical assistance to Partnership agencies to build countywide deportation defense capacity. Catholic Charities and JFCS will be hiring attorneys for the provision of deportation defense services and, while there might be a slight regional focus (West and Central, respectively), these agencies will be responsible for providing these services countywide. Countywide service presents somewhat of a challenge due to the large size of the county, but the partners are confident in the plan to cover all regions.

In addition to the countywide roles, the Partnership has designated a Community Response Lead Agency (responsible for the community response team and leadership council) and a Community Legal Services Lead Agency (responsible for connecting the legal response

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team with the community response team) in each of the three regions, responsible for the services in their region, sharing information about community needs, planning for community supports in the region, and closely collaborating on regional activities and deliverables like workshops/presentations, consultations, outreach to other regional community groups such as faith-based groups, and others. In West County, our Community Response Lead Agency is OCO, in Central is MI, and in East is OCO. In West County, our Community Legal Services Lead Agency is Catholic Charities, in Central is JFCS, and in East is IIBA, with BACR collaborating on community response and outreach activities in East County.

Methods to ensure consistency and coordination among partners including our role:

As the proposed coordinator of the Community Response and Legal Services Hub and Administrative Lead for the Stand Together CoCo Partnership, Catholic Charities will take a leadership role in ensuring consistency, coordination and communication between all partners and the Public Defender's Office. Our intention is that the project benefits from the framework of structured communication and collaboration at all levels of the project in order to ensure success. In terms of overall coordination between all the Partnership agencies, at the beginning of January 2018, Catholic Charities will host a kickoff meeting with all partners to officially begin the work of the project, collaborate with partners on initial activities, and agree upon plans moving forward. After the kickoff meeting, Catholic Charities will host weekly conference calls with all partners during the first two months of the project, which we consider the start-up phase. After the start-up phase is complete, Catholic Charities will host every other week conference calls with all partners for continued collaboration and coordination. Catholic Charities will also host every other month (or monthly if needed) in-person partner meetings for the purpose of evaluation of progress and detailed planning of the work upcoming. Catholic Charities will be in

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regular contact with the Public Defender's Office for the purpose of coordination, collaboration, information-sharing, and administrative duties.

In addition, the leaders of the Community Response Teams in each region will be constantly communicating and collaborating to ensure consistency of activities, share challenges and strategies, and collaborate on deliverables and outreach. The Community Legal Services Lead Agencies in each region will each have a part-time legal assistant to support their role of regularly connecting with the Community Response Teams to share important regional information, collaborate on regional deliverables, and coordinate the referral of community members in need of legal support from the hotline.

Important elements necessary to success for a multi-partner combined-services project:

In addition to the intentional in person and phone communication structure described above, there are several other elements that our Partnership considers key to the success of this project, all of which are crucial in the initial months. The first is all partners' commitment to the community we serve and the goals of this project. Each agency individually has a fervent, long-term commitment to our community and to the goals of this project; and further, have worked together for many years closely and productively. As such, we know that all partners can commit to being flexible and responsive as this project and the needs of the community unfold. We are ready to adjust course quickly if need be, and have established an ongoing structure of evaluation and process improvement. It will also be important that the Partnership agencies agree upon key policies around data sharing, confidentiality, attendance at collaborative meetings, and responsibilities around activities/deliverables. Partners will also commit to consistent data and deliverables tracking and data compilation practices in order to quantify progress and outcomes across the project. Partners will also collaborate closely on capacity-building within the

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partnership, especially amongst newly hired positions, but also amongst the agencies themselves.

All of the partners have deep expertise in various areas of service that will benefit the Partnership and the communities we serve, and it will be important to leverage all of that expertise to build capacity in key areas of service and expertise throughout the Partnership and County.

Alignment of the scope of work with the organization's other activities, projects, or resources:

Catholic Charities', as well as the other Partnership agencies', proposed scope of work on this project aligns with, complements, and leverages our organization's existing work and priorities. At Catholic Charities, we have been providing Immigration Legal Services to immigrant communities in Contra Costa County since 1980, and we currently have two offices in the county (in Richmond and Concord) where we provide these services. We know the need in the county is high, and it is one of our organization's goals to take a leadership role in ensuring that immigrants in Contra Costa County are protected and provided the services that they need during these scary and uncertain times. Catholic Charities has funding to provide Know Your Rights presentations and legal consultations in the county that can be leveraged to help achieve the goals of this project. Catholic Charities also has significant legal staff in Contra Costa County that are ready to support on this project even though they are not funded by the Stand Together CoCo budget. The Stand Together CoCo Partnership agencies largely have funding for related services that can be leveraged to increase the impact of this project as well as staff, expertise, and deep community connections that will be leveraged in support of the goals of Stand Together CoCo. All of our agencies prioritize supporting and protecting the vulnerable immigrant communities in Contra Costa County, and this project is directly in line with all of our collective goals.

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Attachment A: Project Timeline

Task Name	Q1											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1 Year 1: Start-Up & Implementation	Year 1: Start-Up & Implementation											
2 Start-Up Phase: hiring, training, planning, & coordinating for all deliverables & activities	Start-Up Phase: hiring, training, planning, & coordinating for all deliverables & activities											
3 Catholic Charities hosts all partner kickoff meeting	Catholic Charities hosts all partner kickoff meeting											
4 Centro Legal starts taking cases	Centro Legal starts taking cases											
5 Hiring for all positions that did not start 1/2/18	Hiring for all positions that did not start 1/2/18											
6 Project is fully staffed	Project is fully staffed											
7 Catholic Charities & JFCS start taking cases	Catholic Charities & JFCS start taking cases											
8 Training & leadership development begins for staff	Training & leadership development begins for staff											
9 Volunteer recruitment begins	Volunteer recruitment begins											
10 Implementation Phase: Activity on all deliverables in underway	Implementation Phase: Activity on all deliverables in underway											
11 Hotline operation begins	Hotline operation begins											
12 Workshops & presentations begin in all regions (as does webinar development)	Workshops & presentations begin in all regions (as does webinar development)											
13 In-reach to county jails begins	In-reach to county jails begins											
14 Legal consultations begin in all regions	Legal consultations begin in all regions											
15 Outreach to the faith-based community and school districts begins	Outreach to the faith-based community and school districts begins											
16 Leadership Councils begin meeting	Leadership Councils begin meeting											
17 Training & leadership development begins for volunteers	Training & leadership development begins for volunteers											
18 Year 2: Deliverables achieved at rates in RFP												
19 Year 3: Deliverables achieved at rates in RFP												

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 Attachment B: Project Budget

Stand Together CoCo, Budget		Annual cost per FTE / Item	FTE on project / Number of Items	Year 1 (FY17-18) (6 months)	Year 2 (FY18-19)	Year 3 (FY19-20)
Costs						
	Host (Office of the Public Defender)					
	Costs for Host		1.20	\$82,300	\$84,300	\$76,800
	Community Response Team					
	Stand Together Community Hub Coordinator	\$ 60,000	1.00	\$30,000	\$60,000	\$60,000
	Community Response Leader (West County)	\$ 57,000	1.00	\$28,500	\$57,000	\$57,000
	Community Response Leader (East County)	\$ 57,000	1.00	\$28,500	\$57,000	\$57,000
	Community Response Coordinator	\$ 31,200	0.50	\$7,800	\$15,600	\$15,600
	Community Organizer	\$ 35,360	0.75	\$13,260	\$26,520	\$26,520
	Community Engagement Manager	\$ 54,000	0.40	\$10,800	\$16,600	\$16,600
	Local Responders (benefitted) (Six 0.50 FTE paid @ \$15/hr)		3.00	\$49,400	\$110,560	\$110,560
	Benefits (@ 20%)	20%	7.65	\$33,652	\$68,655	\$68,655
	Local Responders (stipended) (Four @ 7 hrs/wk, or Four 0.175 FTE)		0.70	\$9,100	\$18,840	\$18,840
	Print materials @ approx. \$1,600 for Spanish, \$500 per language in the top six languages	460	10	\$2,300	\$4,000	\$4,000
	Other: Laptops (3 @ \$500 ea.)	500	3	\$1,500	\$0	\$0
	Other: Training Stipends (4 @ \$690 ea. per yr.)	690	4	\$1,380	\$2,760	\$2,760
	Other: Meeting expense (food, childcare, etc) (\$240/workshop @ 24 per yr.)	240	24	\$2,880	\$5,760	\$5,760
	Cell phones (per FTE, @ \$50/ FTE /month) (15 FTE)	50	180	\$4,500	\$9,000	\$9,000
	Local mileage for Community Action Unit @ approx. 1410 miles/month @ \$.535/mile	0.535	16910	\$5,523	\$9,047	\$9,047
	Indirect @ 12% of all program costs	12%		\$27,491	\$55,361	\$55,361
	Costs for Community Action Unit			\$256,586	\$516,703	\$516,703
	Legal Services Team					
	Senior Attorney (including technical assistance)	\$ 85,000	1.00	\$42,500	\$85,000	\$85,000
	Staff Attorney	\$ 66,000	2.20	\$72,230	\$152,234	\$152,558
	Legal Services Assistant	\$ 38,966	0.75	\$14,782	\$21,565	\$21,565
	Benefits (@ 20%)	20%	3.95	\$25,902	\$51,760	\$51,825
	Cell phones @ \$50/FTE/month (3.0 FTE attorneys)	50	36	\$900	\$1,800	\$1,800
	Document translation costs	250	10	\$1,500	\$2,500	\$2,500
	Other: Supplies	168.8	10	\$844	\$1,688	\$1,688
	Other: Photocopying	100	10	\$500	\$1,000	\$1,000
	Other: Computers & Software (3 @ \$500 ea.)	500	3	\$1,500	\$0	\$0
	Other: Litigation & Legal Filing Fees	120	10	\$1,200	\$2,400	\$2,400
	Local mileage for Attorneys @ 200 miles/month/FTE @ \$.535/mile (3.0 FTE attorneys)	0.535	7200	\$1,926	\$3,852	\$3,852
	Indirect @ 12% of all program costs (excluding consultants and non-recurring costs)	12%		\$19,654	\$38,856	\$38,902
	Costs for Legal Services Unit			\$183,438	\$362,655	\$363,090
	Flexible legal defense funds/litigation expenses including expert witnesses			\$ 2,635	\$ 2,000	\$ 2,200
	Fiscal Fee for Catholic Charities as Lead Agency (10%)	10%		\$49,184	\$97,927	\$97,998
	Total Operating Costs			\$ 574,143	\$ 1,063,585	\$ 1,056,791

The Stand Together CoCo Partnership proposes a three-year budget (with Year 1 representing 6 months). Year 1 budgeted expenses have been carefully tailored to fit programmatic need, with Years 2 and 3 following the budget priorities set in Year 1. Because of the start-up nature of this project, it is the Partnership's intention to reflect on the budgeted expenses, actual expenses incurred, and community needs at the end of Year 1 in order to revise the Years 2 and 3 budgeted amounts to best serve community needs and reflect Partnership priorities.

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 Attachment B: Project Budget

YEAR 1 (FY17-18) (6 months)									
Stand Together CoCo, Budget		TOTAL	Catholic Charities	Centro Legal	JFCS-EB	IIBA	MI	OCO	BACR
Costs									Public Defender
Host (Office of the Public Defender)									
Costs for Host		\$82,300	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Community Response Team									
Stand Together Community Hub Coordinator		\$30,000	\$30,000						
Community Response Leader (West County)		\$28,500						\$28,500	
Community Response Leader (East County)		\$28,500						\$28,500	
Community Response Coordinator		\$7,800					\$7,800		
Community Organizer		\$13,260					\$13,260		
Community Engagement Manager		\$10,800					\$10,800		
Local Responders (benefitted) (Six 0.50 FTE paid @ \$15/hr)		\$49,400						\$36,400	\$13,000
Benefits @ 20%		\$33,652	\$6,000		\$0	\$0	\$6,372	\$18,680	\$2,603
Local Responders (stipended) (Four @ 7 hrs/wk, or Four 0.175 FTE)		\$9,100	\$0		\$0		\$9,100		
Print materials @ approx. \$1,600 for Spanish, \$500 per language in the top six languages		\$2,300	\$500					\$1,300	\$500
Other: Laptops (3 @ \$500 ea.)		\$1,500	\$500				\$1,000		
Other: Training Stipends (4 @ \$690 ea. per yr.)		\$1,380					\$1,380		
Other: Meeting expense (food childcare, etc) (\$240/Workshop @ 24 per yr.)		\$2,880					\$1,360	\$1,520	
Cell phones (per FTE, @ \$50/ FTE /month) (15 FTE)		\$4,500	\$2,100					\$1,800	\$600
Local mileage for Community Action Unit @ approx. 1410 miles/month @ \$.535/mile		\$5,523	\$1,222				\$1,222	\$2,444	\$635
Indirect @ 12% of all program costs		\$27,491	\$4,839	\$0	\$0	\$0	\$6,275	\$14,297	\$2,080
Costs for Community Action Unit		\$256,586	\$45,161	\$0	\$0	\$0	\$58,569	\$133,441	\$19,415
Legal Services Team									
Senior Attorney (including technical assistance)		\$42,500	\$0	\$42,500					
Staff Attorney		\$72,230	\$27,500		\$27,917	\$16,813			
Legal Services Assistant		\$14,782	\$4,871		\$4,388	\$5,524			
Benefits @ 20%		\$25,902	\$6,474	\$8,500	\$6,461	\$4,467			
Cell phones @ \$50/FTE/month (3.0 FTE attorneys)		\$900	\$300	\$300	\$300				
Document translation costs		\$1,500	\$1,500						
Other: Supplies		\$844							
Other: Photocopying		\$500			\$400	\$444			
Other: Computers & Software (3 @ \$500 ea.)		\$1,500	\$500	\$500	\$500	\$250			
Other: Litigation & Legal Filing Fees		\$1,200	\$500	\$200	\$500	\$0			
Local mileage for Attorneys @ 200 miles/month/FTE @ \$.535/mile (3.0 FTE attorneys)		\$1,976	\$642		\$642				
Indirect @ 12% of all program costs (excluding consultants and non-recurring costs)		\$19,654	\$5,074	\$6,240	\$4,963	\$3,377	\$0	\$0	\$0
Costs for Legal Services Unit		\$183,438	\$47,361	\$58,240	\$46,320	\$31,517	\$0	\$0	\$0
Flexible legal defense funds/litigation expenses including expert witnesses		\$2,635	\$2,635	\$0	\$0	\$0	\$0	\$0	\$0
Fiscal Fee for Catholic Charities as Lead Agency (10%)		\$49,184	\$49,184						
Total Operating Costs		\$574,143	\$144,341	\$58,240	\$46,320	\$31,517	\$58,569	\$133,441	\$19,415
									\$82,300

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Attachment C: Project Budget Narrative

Community Response Team: Yr. 1 Total \$256,586 (Yr 2: \$516,703, Yr 3: \$516,703)

Catholic Charities: 1.0 FTE Community Hub Coordinator will provide overall coordination of community and legal response, and will be hired at \$60,000 annual salary with \$30,000 paid in Year 1 and \$60,000 in Years 2 and 3.

OCO: Two 1.0 FTE Community Response Leaders will be hired at the annual salary of \$57,000 to provide overall response coordination of community response teams in East and West County including hotline, dispatch, training, and support. \$28,500 will be paid to each position in Year 1 with \$57,000 paid in Years 2 and 3.

Monument Impact: The 0.5 FTE Community Response Coordinator (\$31,200 annual salary, paid \$7,800 in Year 1, \$15,600 in Years 2 and 3), 0.75 Community Organizer (\$35,360 annual salary, paid \$13,260 in Year 1 and \$26,520 in Years 2 and 3), and 0.4 Community Engagement Manager (\$54,000 annual salary, paid \$10,800 in Year 1 and \$16,600 in Years 2 and 3), will coordinate the Central County Community Response Team, including hotline staffing and dispatch, community organizing, outreach, and training and leadership development.

Six 0.5 FTE local responders paid at \$15/hr plus benefits will be hired (2 by OCO for West County, 2 by OCO for East County, and 2 by BACR for East County). Two additional responders are needed in East County due to the large size of the region and the underserved nature of the community. In Year 1, \$49,400 will be paid out in total to these positions, with \$110,560 in Years 2 and 3. These positions are responsible for staffing the hotline and providing dispatch, rapid response, and community navigation services.

Benefits for all of the positions described above are paid at 20% as a cap. In Year 1, \$33,652 will be paid in benefits, with \$68,655 in Years 2 and 3.

Four stipended local responders will be hired by Monument Impact to serve Central County

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at 7 hours per week each. These positions are responsible for staffing the hotline and providing dispatch, rapid response, and community navigation services. In Year 1, \$9,100 will be paid out to these positions total, with \$18,840 in Years 2 & 3.

The Partnership's Community Response Team will charge some key non-personnel direct costs that are essential to providing these services including: Print materials in multiple languages (\$2,300 in Year 1 and \$4,000 for Years 2 and 3); Laptops (3 laptops at \$500 each for a total of \$1,500 expended in Year 1); Training stipends for responders (\$1,380 in Year 1 and \$2,760 in Years 2 and 3); Meeting expenses including food and childcare for workshops/presentations (\$2,880 in Year 1 and \$5,760 in Years 2 and 3); 15 cell phones at \$50/month (\$4,500 in Year 1 and \$9,000 in Years 2 and 3); and Local mileage at 1,410 miles per month (\$5,523 in Year 1 and \$9,047 in Years 2 and 3). All agencies will receive the max 12% indirect rate, which totals \$27,491 for the Community Response Team for Year 1 and \$55,361 for Years 2 and 3.

Legal Services Team: Yr. 1 Total \$183,438 (Yr 2: \$362,655, Yr 3: \$363,090)

The 1.0 FTE Sr. Attorney (from Centro Legal) will provide legal representation deportation defense cases and technical assistance to the other legal services providers countywide. The annual salary is \$85,000 (\$42,500 paid in Year 1 and \$85,000 in Years 2 and 3).

2.2 FTE Attorneys at \$66,000 annual salaries for the first two, and \$84,063 for the last one (1.0 FTE from Catholic Charities, 1.0 FTE from JFCS, 0.2 FTE from IIBA). In total on the combined 2.2 FTE positions, \$72,230 will be expended in Year 1 with \$152,234 in Year 2 and \$152,558 in Year 3. The attorneys will provide deportation defense, legal consultations, and community workshops and support.

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Three 0.25 FTE Legal Services Assistants will be supported at each of the regional Legal Services Lead Agencies: Catholic Charities, JFCS, and IIBA, and their role will be to connect the legal services teams to the community response teams. In total in Year 1, these positions will cost \$14,782, with \$21,565 in Years 2 and 3.

Benefits for all of the positions described above are paid at 20% as a cap. In Year 1, \$25,902 will be paid in benefits, with \$51,760 in Year 2, and \$51,825 in Year 3.

The Partnership's Legal Services Team will charge some key non-personnel direct costs that are essential to providing these services including: 3 cell phones at \$50/month (Year 1: \$900, and \$1,800 in Years 2 and 3); document translation costs at \$250 per, with 10 per year (Year 1: \$1,500, and \$2,500 in years 2 and 3); supplies (\$844 in Year 1, and \$1,688 in Years 2 and 3); photocopying (\$500 in Year 1 and \$1,000 in Years 2 and 3); 3 computers at \$500 each (\$1,500 in year 1); litigation and legal filing fees (\$1,200 in Year 1 and \$2,400 in Years 2 and 3); and mileage (\$1,926 in Year 1, and \$3,852 in Years 2 and 3). All agencies will receive the max 12% indirect rate, which totals \$19,654 for Year 1, \$38,856 for Year 2 and \$38,902 for Year 3. A flexible legal fund for litigation expenses will be available at \$2,635 in Year 1, \$2,000 in Year 2, and \$2,200 in Year 3.

Catholic Charities will charge a 10% fiscal agent fee for our administrative role in the project totaling \$49,184 in Year 1, \$97,927 in Year 2, and \$97,998 in Year 3.

The Stand Together CoCo Partnership agencies have some funding for related services that can be leveraged to increase the impact of this project as well as staff, expertise, and deep community connections that will be leveraged in support of the goals of Stand Together CoCo.

ATTACHEMENT D: PROJECT RESUMES & JOB DESCRIPTIONS

Chuck Fernandez, MA-Organization Development, MBA, MS-IS, CPA
(inactive) cfernandez@cceb.org

PROFESSIONAL HISTORY

Catholic Charities of the East Bay, Oakland, CA.

Chief Executive Officer – May 2014 to Present

Responsible for a \$6M budget, 60 employees, and all matters related to human resources, administration, accounting and finance, fundraising, grants, and all client programs. Catholic Charities provides over 20 programs in Alameda and Contra Costa Counties.

Catholic Charities of the Diocese of Santa Rosa, Santa Rosa, CA

Executive Director - March 2011 to May 2014

Responsible for a \$7.6M budget, 90 employees, and all matters related to human resources, administration, accounting and finance, fundraising, grants, social enterprise, expansion, and client programs including homeless shelter and housing, seniors, food distribution, outreach, immigration, and volunteer coordination. Catholic Charities provides over 30 programs in four counties. Changed staffing mix to include more experienced and degreed professionals.

Lake County Mental Health Department - Lakeport, CA

Deputy Director, Fiscal Administration November 2008 to October 2009

Responsible for all fiscal and operational matters of the department including billing, collections, federal and state reporting, IT, contracts, managed care, and reception.

Sutter Medical Foundation North Bay, Santa Rosa, CA

Finance Director October 2007 to March 2008

Responsible for accounting, billing and collections, financial analysis, and revenue cycle.

Mendocino Community Health Clinic, Inc. Ukiah, CA

Chief Financial Officer February 2005 to August 2007

Responsible for all financial matters of the organization; partnered with CEO, management team, and board of directors to design and oversee the strategy, operations and performance of the clinics.

Petaluma Health Center, Petaluma, CA

Chief Financial Officer 2003 to February 2005

Responsible for financial records of the center and compliance with laws and regulations.

Director of Operations July 2002 to 2003

Responsible for non-clinical operations including: reception, referrals, medical records, outreach, human resources, management information systems, scheduling, facilities maintenance, and billing.

Kaiser Permanente, Northern California Region 1991 to 2002

Service Area Leader Santa Rosa 2001 to May 2002

Responsible for patient billing and collection of non-dues revenue for four business offices. This included all patient and third-party billing, disability, and other claims.

Contracts Manager Oakland 2000 to 2001

Worked with physicians and finance in three medical facilities to contract for outside medical services.

Project Manager Santa Rosa 1997 to 2000

Managed implementation of two corporate initiatives: Adult Primary Care (integrated team-based model) and the Regional Appointment and Advice Call Center.

Medical Office Financial Analyst Santa Rosa February 1991 to 1997

Managed \$60 million budget; worked with physicians and managers to develop, implement, and monitor budgets; created monthly reporting system of financial and operational results.

Southern Pacific Transportation Company, San Francisco, CA

Manager of Internal Audits 1981 to 1991

Supervised operational and financial internal audits; facilitated the annual audit with external auditors; developed workflow analysis and standard audit plans; implemented internal control systems resulting in financial savings and improved operational efficiencies.

Alexander Grant & Company, Honolulu, Hawaii

Staff auditor 1978-1980

Performed the detailed work of various financial audits under the supervision of senior accountants and managing partner.

EDUCATION

- Master of Arts, Organization Development, Sonoma State University, May 2010
- University of Notre Dame Mission to Service Leadership Program, October 2010
- UCLA/J&J/HRSA Resident Health Care Executive Program, June 2007
- Master of Science, Information Systems, Golden Gate University, San Francisco, CA 1987
- Master of Business Administration, Accounting, University of Dayton, Dayton, OH 1977
- Bachelor of Science, Business Administration, University of Colorado, Boulder, CO 1976
- Certified Public Accountant (CPA), State of Hawaii, Certificate #1816, 1980 (license not active)

Lisa Knox

EDUCATION

Columbia University School of Law, New York, New York

Juris Doctor, May 2011

Honors: Hamilton Fellow, Harlan Fiske Stone Scholar

Activities: Frederick Douglass Moot Court (labor/employment law) 2008-2009 Human Rights Law Review 2009-2010 Board Member

University of California, Berkeley, College of Letters and Science, Berkeley, California

Bachelor of Arts in Political Science (emphasis in Comparative Politics) and History (emphasis in United States social history), May 2004

Honors: Highest Honors in History
Alumni Scholar

EXPERIENCE

Centro Legal de la Raza

Oakland, California

Immigration Managing Attorney

July 2017 – Present

- Co-manage Detention Project, including attorney and support staff supervision, in addition to Staff Attorney duties

Immigration Staff Attorney

February 2016 – July 2017

- Represent detained and non-detained individuals in removal proceedings before San Francisco Immigration Court
- Prepare and file affirmative applications for relief, including DACA
- Supervise intake clinics at two local detention centers

East Bay Community Law Center

Berkeley, California

Staff Attorney and Clinical Instructor

May 2015 – Present

- Provide direct representation of individuals in immigration proceedings, including AWCs and UACs
- Prepare and file affirmative applications for relief, including DACA
- Conduct outreach/KYR presentations to community organizations

Van Der Hout, Brigagliano & Nightingale LLP

San Francisco, California

Associate Attorney

April 2013 – May 2015

Attorney

December 2012- April 2013

- Provided direct representation of individuals in immigration proceedings, including representation in bond hearings
- Prepared and filed affirmative applications for relief, including asylum, adjustment of status, waivers of inadmissibility, DACA, U visa and naturalization
- Drafted briefing for cases before the Board of Immigration Appeals and the Ninth

Circuit Court of Appeals

Lawyers' Committee for Civil Rights

San Francisco, California

Attorney

July 2012 – October 2012

- Oversaw reentry legal services clinic and provided or secured representation where appropriate
- Supervised volunteer attorneys, law clerk and program coordinator
- Engaged in coalition--based policy advocacy at state and local level to limit law enforcement cooperation with ICE

Immigrant Justice Fellow

- Drafted memos, declarations and legal briefs, participated in settlement negotiations and served as client contact for *de--Abadia--Peixoto v. DHS* (N.D. Cal)
- Investigated and proposed potential litigation to address DHS refusal to issue temporary green cards to LPRs in immigration proceedings

Beldock, Levine & Hoffman LLP

New York, New York

Summer Associate

May-August 2010

- Conducted legal research for civil rights litigation firm on issues relevant to Section 1983, employment discrimination, and other civil rights claims
- Drafted *habeas ad testificandum* motion and order to facilitate deposition of prisoner
- Co-authored book chapter on application of international human rights standards to prison health services litigation, and report on guardianship standards for the mentally disabled under New York state law

Columbia University School of Law Human Rights Clinic

New York, New York

Teaching Assistant

September 2010 – May 2011

- Led project team drafting report examining Walmart Corporate Social Responsibility policies and their relation to labor practices of supplier factories
- Administered project team and provided substantive input and editing for stakeholder report to U.N. Committee on Civil and Political Rights ahead of U.S. periodic review

Student Advocate/Researcher

September 2009 – May 2010

- Conducted research, analysis and client interviews for Inter-American Commission case regarding unlawful expulsion of Haitian migrants from the Dominican Republic
- Drafted policy brief on post-earthquake protection concerns for Haitian migrants in the Dominican border region that was presented to State Department officials

ADDITIONAL INFORMATION

Bar Admission: California, December 2011; Ninth Circuit Court of Appeals

Language Skills: Spanish (proficient)

JUAN ORTIZ
jortiz@iibayarea.org

EDUCATION

Whittier School of Law, Costa Mesa, California
Juris Doctor, June 2010

California State University, San Francisco, San Francisco, California
Bachelor of Arts, Criminal Justice, May 2006

BAR ADMISSION

State Bar of California, # 277162, admitted June 2011

PROFESSIONAL EXPERIENCE

International Institute of the Bay Area, Antioch, California
Program Director – Contra Costa County, November 2012 - Present

- Recruit, train and supervise staff and volunteers
- Manage program including community relations and program budget
- Maintain and develop collaborative and professional relationships
- Coordinate and perform community outreach and education
- Ensure compliance with grant deliverables and reporting requirements

International Institute of the Bay Area, Antioch, California
Staff Attorney, June 2011 – Present

- Conduct client consultations to answer general immigration questions and to determine immigration relief eligibility
- Represent clients in immigration applications including family petitions, adjustment of status, consular processing, naturalization, green card renewal, DACA, and U-visa
- Represent clients at naturalization and adjustment of status interviews before USCIS

International Institute of the Bay Area, Oakland, California
Legal Fellow, September 2010 – May 2011

- Conducted client intake interviews to determine immigration relief eligibility through programs such as U-Visa, Violence Against Women Act, and Deferred Action for Childhood Arrivals
- Managed caseload of immigration applications including U-Visa, VAWA, and adjustment of status

LANGUAGES

- Fluent in Spanish

Position Title: Stand Together CoCo Community Response & Legal Services Hub Coordinator

Area/Program Focus: Immigration Legal Services

Position Summary:

Catholic Charities of the East Bay (CCEB) works with youth, children and families to promote self-sufficiency, strengthen families and pursue safety and justice. The Immigration Legal Services Department has provided relief for immigrants and refugees for over 35 years. With a full staff of five attorneys, two Board of Immigration Appeals (BIA) accredited representatives, paralegals, legal assistants, law students and support staff in Oakland, Concord, and Richmond, CCEB is one of the largest providers of immigration legal services for low income families in the East Bay.

The Coordinator is responsible for the management and Coordination of the Stand Together CoCo Partnership, including coordinating of meetings; deliverables planning, achievement, and tracking; project reporting; and facilitating communication and information sharing between the Partnership agencies.

The Coordinator position will be based in Concord or Richmond. Periodic travel to each of the three offices may be required, as well as frequent travel throughout Contra Costa County for community and Partnership events.

Essential Responsibilities:

- Plan for and implement the Stand Together CoCo Partnership deliverables and activities in coordination with CCEB staff and partner agencies.
- Plan, coordinate, and in some cases provide up to date Know-Your-Rights presentations to the immigrant community on their individual rights, current immigration law and policy topics.
- Collaborate with parishes and congregations, community centers, community-based organizations, and schools to coordinate Know-Your-Rights education and the provision of immigration legal services.
- Collaborate with other legal service providers and organizing groups in the community to work together, share information and organize trainings.
- Coordinate screenings for potential immigration relief.
- Prepare written materials, including flyers and handouts, for community events.
- Attend trainings and courses to remain updated on immigration law and policy.
- Develop relationships with media outlets and other partners to share stories and promote events.
- Work closely with Immigration Legal Services staff in coordinating legal representation for eligible clients.
- Maintain accurate and up-to-date client information in database.
- Assist with recruiting, training, and supervision of volunteers.

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- Other duties as assigned.

Success Metrics:

- Assist Program Coordinator and Manager of Immigration Legal Services in working towards overall success of the Stand Together CoCo project through coordinating activities, deliverables, and partner communication.

Qualifications/Requirements:

- Associate's or Bachelor's Degree or University level education equivalent from other countries
- Must be fluent in spoken and written Spanish
- Experience working with low-income, immigrant, and monolingual Spanish-speaking communities
- Strong administrative, organizational, interpersonal, verbal communication, and writing and presentation skills are required
- Effective public speaker
- Must have proven and strong leadership skills
- Professional technology skills including Microsoft Word, Excel, and PowerPoint, Adobe Acrobat, and database software. Ability to scan, edit and create PDF files and experience with shared folders
- Experience with data entry and reporting with software
- High level of independent judgment
- High analytical abilities to spot issues and plan legal services for clients

Position Title: Immigration Attorney – Catholic Charities Richmond Office

Position Summary: Catholic Charities of the East Bay (CCEB) works with youth, children and families to promote self-sufficiency, strengthen families and pursue safety and justice. The Immigration Legal Services Department has provided relief for immigrants and refugees for over 35 years. With a full staff of attorneys, Department of Justice (DOJ) accredited representatives, paralegals, law students and support staff in Oakland, Concord, and Richmond, CCEB is one of the largest providers of immigration legal services for low-income families in the East Bay. The Immigration Attorney is responsible for providing direct legal representation to detained and non-detained clients who are in removal proceedings before the San Francisco Immigration court. The Immigration Attorney will also prepare and submit applications, legal briefs, and supporting documentation for cases involving asylum, withholding of removal, relief under the Convention Against Torture, U visa, VAWA, and adjustment of status with applicable waivers, refugee waivers, and Special Immigrant Juvenile Status will also in family based immigration, U-Visa and VAWA applications, DACA and naturalization cases. A successful candidate for this position will be a currently licensed immigration attorney experienced in the provision of immigration legal services. The attorney supervises the work of paralegals and accredited representatives in representing clients. The attorney works with the legal program staff to provide guidance and assistance on cases; the attorney also provides community presentations on immigration law and immigrant rights. The attorney position will be based in Richmond.

Reports to: Supervising Attorney, Immigration Legal Services

Supervisory Responsibility: Supervision of DOJ accredited representatives, legal assistants, law students and other support staff and participation in case rounds.

Essential Responsibilities:

- Directly representing non-detained and detained individuals in removal proceedings before the San Francisco Immigration Court;
- Preparing and submitting applications, legal briefs, and supporting documentation for cases involving asylum, withholding of removal, relief under the Convention Against Torture, U visa, VAWA, and adjustment of status with applicable waivers, refugee waivers, and Special Immigrant Juvenile Status;
- Visiting detained individuals at Bay Area detention centers;
- Provide direct legal services by meeting with clients, preparing applications for relief, drafting client declarations, and submitting cases to Executive Office of Immigration Review ("EOIR") and U.S. Citizenship and Immigration Services ("USCIS")
- Representing clients in administrative interviews before USCIS
- Attend trainings and courses to remain updated on immigration law and policy.
- Maintaining accurate and up-to-date client information in database.
- Assist with recruiting, training, and supervision of legal department volunteers.
- Participate in workshops for the public and collaborative partners on basic pathways to citizenship, benefits eligibility, understanding individual rights, and other topics.
- Collaborate with partner organizations to refer clients to legal and mental health services as appropriate

Catholic Charities of the East Bay (Lead Applicant)
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- Conduct outreach events and presentations, including know-your-rights workshops and legal screening events to increase awareness of pathways to relief, legal rights and responsibilities, and enable access to legal resources

Success Metrics:

- Assist Manager of Immigration Legal Services in working towards sustainability
- Provide accurate data collection for grant reporting and proposals
- Provide legal immigration consultations to determine eligibility for forms of relief
- Represent clients in applications for legal status, including family based immigration, U-Visa and VAWA applications, DACA and naturalization cases
- Directly representing non-detained and detained individuals in removal proceedings before the San Francisco Immigration Court

Qualifications/Requirements:

- Membership and good standing in the California State Bar
- JD or LLM from ABA law school
- 3-5 years of experience providing legal representation to non-citizens before the Executive Office of Immigration Review and Citizenship & Immigration Services
- Advanced understanding of immigration and citizenship law and procedure, including family based immigration, consular processing, waivers of grounds of inadmissibility, U visa and VAWA, T visa, adjustment of status, asylum, Special Immigrant Juvenile Status (SIJS), naturalization and DACA
- Minimum of two years of direct immigration legal service experience including representing clients in the above subject areas before EOIR and/or USCIS
- Spanish language fluency
- Experience supervising and managing paralegals, accredited representatives and/or law student interns, including training and working towards office goals
- Competency to serve clients from a variety of cultures
- High level of independent judgment
- High analytical abilities to spot issues and plan legal services for clients
- Professional level skills using Word, Excel, and Acrobat. Proven ability to master legal database systems

Core Competencies:

- Demonstrates a fundamental respect for the dignity of others. Works collegially and is a proven team builder. Inclined to coach and teach in order to improve knowledge and ability of others, but holds people accountable for results
- Understands and values quality improvement. Able to effectively address overlapping projects and deadlines. Adaptable and reliable in face of conflict, crisis, or changing priorities
- A demonstrated commitment to diversity and inclusion; valuing a diversity of perspectives and encouraging contributions by all team members
- Ability to be a team leader and a team member
- Ability to thrive in a flexible, fast-paced, accredited, and growth oriented environment while maintaining a positive solution oriented approach
- High analytical abilities to process large amounts of data from multiple sources. Ability to prioritize across multiple types of work and coordinate the work of others
- Ability to network and interact internally and externally

Position Title: Immigration Legal Assistant
(Template from Catholic Charities, to be adapted and used by partner agencies that have this position funded through this proposal)

Position Summary: Catholic Charities of the East Bay (CCEB) is strongly committed to the well-being and self-sufficiency of immigrant families. The Immigration Legal Services Department provides low-income families with free and low cost quality legal immigration and citizenship services. We have offices in Richmond, Concord and Oakland.

The Immigration Legal Assistant works as an integral part of a team of immigration attorneys, Board of Immigration Appeals (BIA) accredited representatives, paralegals, legal assistants, law student interns and support staff. The Legal Assistant assists in implementing best practices for legal case management, outreach, fee collection, database management, volunteer recruitment and retention, throughout the three main Legal Services office locations.

This position is responsible for answering phone calls and voicemails, responding to client requests in person and online, working with the Administrative Coordinator in the Richmond office in accepting payments from clients, developing case opening and closing procedures with the Legal Services staff. This person will also assist with document translations and other administrative tasks, including ordering supplies and deposits.

This position will be housed in our Richmond office. Periodic travel to each of the three offices may be required for case rounds and staff meetings.

Reports to: Legal Services Program Manager

Supervisory Responsibility: Direct supervision of office volunteers.

Responsibilities: All responsibilities will be in line with the Council on Accreditation (COA) standards including:

Essential Responsibilities:

- Answer phone calls, voicemails, walk-in questions and online requests, schedule appointments at their respective office location
- Enter data on client notes, census/demographic data, and receipt notices
- Open all mail and provide administrative support to Legal Services staff at all offices, including translations, copying, filing with USCIS and entering mailing information in INS-Zoom
- Work with Administrative Coordinators and assisting Legal Services staff with client services by accepting payments of client fees, filing weekly deposits, record all billing transactions, and notifying clients of amount due
- Prepare and file monthly and annual reports on office performance
- Assist legal staff with client services by checking clients in on consult and workshop days, conducting the opening appointment for all legal cases, prepare file, accept client in INS-Zoom, review and sign contracts, collect fees and issue receipts
- Close case files and maintain closed cases according to office policy, including tracking deadlines
- Coordinate legal services outreach at local events and with other service providers
- Recruit, supervise and retain office volunteers
- Maintain small client caseload comprised primarily of citizenship and deferred action
- Other duties as assigned

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Success Metrics:

- Assist the Legal Services Program Manager in working toward overall sustainability of CCEB
- Assist Legal Services Program Manager with the development of a program logic model and related indicators of success
- Legal Services will have processes for indicator measurement, quality and review
- Legal Services will have accurate data collection for grant reporting and proposals

Qualifications/Requirements:

- Associate's or Bachelor's Degree or University level education equivalent from other countries
- 2+ years of experience providing administrative support in a professional office environment
- Data entry and reporting with software
- Strong administrative, organizational, interpersonal, verbal communication, and writing and presentation skills are required
- Must have proven and strong leadership skills
- Professional technology skills including Microsoft Word, Excel, and PowerPoint, Adobe Acrobat, and database software. Ability to scan, edit and create PDF files and experience with shared folders
- Excellent verbal and written communication skills
- Valid driver's license and proof of insurance

Core Competencies:

- Demonstrates a fundamental respect for the dignity of others. Works collegially and is a proven team builder. Inclined to coach and teach in order to improve knowledge and ability of others, but holds people accountable for results.
- Understands and values quality improvement. Able to effectively address overlapping projects and deadlines. Adaptable and reliable in face of conflict, crisis, or changing priorities.
- A demonstrated commitment to diversity and inclusion; valuing a diversity of perspectives and encouraging contributions by all team members.
- Ability to thrive in a flexible, fast-paced, accredited, and growth oriented environment while maintaining a positive solution oriented approach.
- High analytical abilities to process large amounts of data from multiple sources. Ability to prioritize across multiple types of work and coordinate the work of others.
- High level of independent judgment required.
- Ability to network and interact internally and externally.
- Must be fluent in spoken and written Spanish.
- Experience serving clients from many different cultures.

Jewish Family & Community Services East Bay
Immigration Attorney Job Description

Our Agency

Jewish Family & Community Services East Bay (JFCS East Bay) is an innovative social service agency that has served individuals and families throughout Alameda and Contra Costa counties since 1877. We are proud to provide multilingual, culturally sensitive services to refugees and immigrants, older adults and their families, children and their parents, Holocaust survivors, and people with disabilities. JFCS East Bay actively seeks to hire qualified professionals who reflect the cultural and linguistic diversity of the East Bay and of our clients. Agency offices are located in Berkeley, Walnut Creek, and Oakland. We encourage you to visit our website at www.jfcs-eastbay.org for more information.

Program Description

JFCS East Bay's Refugee & Immigrant Services department has been providing a wide range of multicultural, multilingual services since the late 1980s. Our Immigration Legal Services program offers a range of low-fee legal services, including citizenship, family-based petitions, family-based permanent residency, U visas, travel documents, VAWA self-petitions, and a variety of waivers. Our focus is expanding our services towards the urgent needs of the immigrant community. Stand Together Contra Costa will provide an array of community-based, culturally competent, no-cost rapid response support, legal defense services and clinics, immigrant rights education and training, and direct service support for individuals and families drawn into the federal deportation system.

Job Summary

Under the supervision of JFCS East Bay's Immigration Legal Services Attorney and Program Coordinator, the Immigration Attorney will serve as part of the Stand Together Contra Costa collaborative team, working closely with our collaborative agencies. The Immigration Attorney will work under the Stand Together Contra Costa Senior Attorney.

Job Duties

- Clinical and case work.
- Assist in intake screening and brief service for immigration program.
- Provide research in writing to Senior Attorney to assist with removal and other proceedings in Immigration Court.
- Represent clients at USCIS interviews.
- Write motions, briefs, and BIA appellate briefs.
- Prepare applications for cancellation of removal, adjustment of status, asylum, NACARA, and naturalization, among others.
- Ensure that legal work is consistent with Stand Together Contra Costa's mission.
- Provide assistance and participate in community workshops and clinics held by other Stand Together Contra Costa collaborative members.
- Develop informational materials on immigration law.
- Keep abreast of changes in immigration law

Requirements

- Membership and good standing in the bar of any state or federal territory. California license preferred.
- Juris Doctor (JD) degree from an ABA-accredited law school.
- Bilingual in spoken and written Spanish.
- Ability to work with skill and sensitivity in a multicultural environment.
- Experience and interest in working with ethnically diverse populations.
- Strong oral, written, interpersonal, and computer skills.

Benefits include medical, dental, 401(k), generous holiday and vacation, great colleagues, and a friendly work environment. Compensation is competitive, depending on experience.

Proposed Job Description
Community Response Leader – OCO – Stand Together CoCo RFP

OCO is seeking a full time (1.0 FTE) Community Response Leader to provide training, workshops, and coordination of volunteers and supervision of rapid response dispatchers with the newly formed Stand Together CoCo team in Contra Costa County. The Community Response Leader will be responsible for organizing events and trainings around “Know Your Rights” and to provide a kit of “protection tools” with the new team of immigrant, advocacy partners to provide trainings to a variety of immigrant communities impacted by deportation and criminalization of immigrants. The Community Response Leader will support the team’s work in base-building and organizing efforts to expand educational and legal resources for immigrants in Contra Costa County.

Responsibilities:

- Attend the monthly meeting with the Stand Together CoCo team.
- Work with other Community Response Leaders to coordinate a Rapid Response process as needed.
- Maintain a database of community events attendees, and referrals to services within the team.
- Coordinate referral and services with other community responders in the team.
- Organize and lead “know your rights” events in coordination with trainers and other organizations.
- Identify and develop community leaders who can organize and implement community events.
- Develop leaders, that is, community residents, in one to one and group training settings.
- Engage people in community and partner organization events as needed.
- Generate and submit activity reports to Catholic Charities of the East Bay as required.
- Connect resources provided by the partner groups to ensure support is equitably provided to immigrants and other communities impacted by law enforcement and deportation actions.

Preferred Skills and Qualifications:

- Bilingual; excellent written and oral communications in English and in Spanish.
- Excellent project and time management skills.
- At least two years of experience as a community organizer.
- Experience in organizing coordinating and managing events (childcare, translation, etc.).
- Maintain timely and clear communications with administration and OCO staff.
- Experience in training around leadership development.
- Experience in working under pressure with little support/supervision.
- Self-motivated and self-determining.
- Open to working some evenings and or weekends.
- Knowledge of how to create agendas with clear goals.
- Team player.
- Open to feedback.
- Outreach experience.
- Open to continue leveraging relationships with people in power and willing to develop new ones.
- Prepare leaders to facilitate events and to use their own voice to guide and lead others.

Proposed Job Description
Local Responder – OCO – Stand Together CoCo RFP

OCO is seeking two part-time (0.5 FTE) Local Responders to staff a dispatcher/rapid response hotline, and to recruit volunteers who will also work on the hotline. These roles will be part of the newly formed Stand Together CoCo team in Contra Costa County. The Local Responders will be supervised by and work with the Community Response Leader, who will be providing trainings and organizing events such as “Know Your Rights” and to provide a kit of “protection tools” with the new team of immigrant, advocacy partners to provide information to a variety of immigrant communities impacted by deportation and criminalization of immigrants. It is expected that the Local Responders will work days and evenings, including weekend work as required.

Responsibilities:

- Attend the monthly meeting with the Stand Together CoCo team.
- Work with other Local Responders to coordinate a Rapid Response process as needed.
- Maintain a database of community events attendees, and referrals to services within the team.
- Coordinate referral and services with other Local Responders in the team.
- Generate and submit activity reports to Catholic Charities of the East Bay as required.
- Connect resources provided by the partner groups to ensure support is equitably provided to immigrants and other communities impacted by law enforcement and deportation actions.

Preferred Skills and Qualifications:

- Bilingual; excellent written and oral communications in English and in Spanish.
- Excellent project and time management skills.
- Ability to use a phone, comfortable with phone work, and have a pleasing and calm phone voice manner.
- At least two years of experience as a community organizer, social work provider, or crisis hotline worker.
- Experience using computer databases and the ability to type and use a computer with a keyboard and mouse.
- Maintain timely and clear communications with administration and OCO staff.
- Experience in working under pressure with little support/supervision.
- Self-motivated and self-determining.
- Must be able and willing to work evenings and/or weekends as well as day hours.
- Open to supervision, and constructive feedback.
- Team player.
- Open to feedback.
- Outreach experience.
- Ability to sit at up to four (4) hours at a time speaking to people on the phone.



Job Title: Local Responder; Stand Together Contra Costa County

Job Purpose: As part of a 12 member Community Response Team, Responders observe, act and report on any and all incidents in community where residents are threatened by deportation or ICE raids. Responders also conduct outreach in community and schools, as well as in reach in jails, preparing individuals and families for immigration enforcement.

Location: East Contra Costa County

Classification: Half time; .5 FTE (20 hours a week)

Compensation: \$14.00/hour

Job Responsibilities

- Staff the Stand Together hotline; provide information, support, and response for Contra Costa County residents who are threatened with deportation or who are impacted by immigration enforcement activity.
- Serve as trained Legal Observers to witness, document, and collect data regarding actions being undertaken by ICE in Contra Costa.
- Provide immediate support and systems navigation for families and individuals in Contra Costa who have been targeted by/detained by ICE.
- In partnership with the Response Team, develop an outreach plan for East County to spread the word about the Know Your Rights workshops and other activities planned by the collaborative.
- Outreach at organizations, churches and schools distributing material, Know Your Rights cards and other information that prepare families to respond to immigration enforcement.
- In-reach in county jails to individuals who are in ICE detention or have the potential to have an ICE hold.
- Build and maintain strong rapport with people served by the collaborative; using trauma informed care in all contacts with individuals.
- Develop relationships and maintain communication with collaborative members and stakeholders.
- Attend collaborative and adhoc planning meetings as necessary.
- Internal submission of reports reflecting all efforts and updates in meeting collaborative goals
- Represent BACR and the collaborative at networking and community events

Catholic Charities of the East Bay (Lead Applicant)
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Attachment D: Project Resumes & Job Descriptions

- Attend trainings and workshops for professional development and to build the capacity of the collaborative.
- Other duties as assigned

Minimum Qualifications

- Ability to work some evenings and weekends and ability to be on-call
- Must pass fingerprint Live Scan clearance
- Must possess valid California driver's license and vehicles to use for work purposes.
- Must be bilingual in Spanish (to serve monolingual Spanish speaking youth)
- Must have excellent oral and written communication skills
- Must be familiar with trauma informed care
- Ability to work under pressure and provide crisis intervention
- Experience serving undocumented individuals and familiarity with current immigration law
- 2+ years' experience conducting outreach, public speaking or facilitation.

BACR Mission

BACR promotes the healthy development of individuals, families and communities through direct services, volunteerism and partnerships in the Bay Area.

BACR Best Practices

We persevere, are dependable and act with integrity.

We recognize the needs and strengths of customers and support their development.

We are continuous learners - stretching, growing and innovating.

We build healthy relationships and are guided by a caring heart.

Our services are based on proven models and methods.

We work within communities and build alliances to meet community needs.

We focus on results.

We are humble, hopeful and have a sense of humor.

JOB ANNOUNCEMENT

Community Engagement Manager

Located in Concord, CA, Monument Impact (MI) seeks a full-time, bilingual (Spanish/English), empathetic and self-motivated individual to join the MI team to lead our programs that engage Monument residents some of the most urgent issues of our times. This is a unique opportunity during very unsettling times to make a significant difference in the lives of our predominately low-income, immigrant community and to be part of a movement for equity in Contra Costa County.

We are looking for an experienced manager and community organizer who can support and engage the community by building their leadership skills to advocate for equitable policies and programs that will improve the well-being of all Monument residents, including immigration, housing stability, good jobs, health care access and more.

About Monument Impact

Monument Impact's vision is to empower people to build a strong and vibrant quality of life. Our mission is to engage with the community to provide training and tools in order for people to become economically self-sufficient, healthy and safe, civically engaged, connected to each other, and committed to lifelong learning.

Since 2001, Monument Impact has worked with the Monument community of Concord, which is largely comprised of low-income immigrant families and people of color, to address barriers to economic advancement. The Monument Corridor makes up a small portion of the City of Concord, and yet contains more than 40,000 people-- approximately a third of the City's population. The area is more than half Latino and about 50% of residents speak a language other than English at home. Monument residents have limited access to resources and services relative to the rest of Concord.

Job Summary

Reporting to the Executive Director, the Community Engagement Manager engages our local residents in key programs to develop their capacity as leaders. The Community Engagement Manager serves as a valued member of the Management Team and has at least direct report—the Community Engagement Coordinator. Depending on funding for the new Stand Together CoCo rapid response network in Contra Costa County, other direct reports will include MI's Stand Together CoCo Organizer and Coordinator S/he will provide the tools and training for local residents to be proactive architects of the future of the community. S/he will collaborate with other staff to ensure that the community's interests are actively represented in advocacy efforts and to meet program objectives. The successful candidate will enjoy building relationships with diverse constituencies such as MI's day laborers, community promotores, local residents, faith leaders, partners and other stakeholders.

Areas of Responsibility

- Leadership Development:

- Implement leadership trainings that will strengthen the capacity of local residents to build community power and advocate on critical issues that impact low income, immigrant families through in-depth skill building, leadership development and mentoring
- Work with MI's Stand Together CoCo Organizer and other partner agencies to deliver Leadership Development and Train the Trainer trainings focusing on the rapid response network and Know Your Rights workshops
- Connect residents with regular leadership opportunities such as advocating with policy makers, speaking to the media, and facilitating meetings
- Build a strategy for growing MI's base in Concord
- Work with leaders to conduct listening sessions in the community and identify opportunities for local residents to engage in campaigns that will improve their lives
- Actively represent the MI community at different partnership and coalition meetings

- Program Management:

- Create detailed program plans, outlining deliverables and timelines, facilitating effective teamwork, and providing regular updates to Executive Director and Management Team on the progress of programs and organizing efforts
- Work in collaboration with the Community Engagement Coordinator and other direct reports on data collection in Salesforce, as well as support the writing of timely reports
- Other duties as assigned

Qualifications

- Bachelor degree required, ideally in education, sociology, social work or business
- Commitment to equity, social and economic justice and bottom-up social change
- Minimum three years' experience in community organizing, developing leaders, managing programs and program budgets; supervision experience is ideal
- Bilingual (Spanish/English) is required with excellent communication skills, written and verbal, in both English and Spanish
- Proven success working in an underserved, multi-cultural environment and ability to build strong working relationships with diverse groups of people
- Ability to guide, direct, and support others to advocate for equity and inclusion
- Confident and creative thinker with outstanding management and time skills
- Ability to set boundaries and work in a fast-paced environment
- Demonstrated ability to track program outcomes and other participant data
- Computer proficiency in Outlook, Word, Excel and PowerPoint; experience with Salesforce or another database program is ideal

Compensation and Benefits

- This is a full-time, exempt position
- Compensation is commensurate with experience
- Benefits include medical, dental and vision, paid holidays and vacation.

JOB DESCRIPTION
PROMOTORES/Hotline Dispatchers for STAND TOGETHER CoCo
4 Stipended Part-time Positions
DRAFT-to be translated into Spanish

About Monument Impact

Monument Impact's vision is to empower people to build a strong and vibrant quality of life. Our mission is to engage with the community to provide training and tools in order for people to become economically self-sufficient, healthy and safe, civically engaged, connected to each other, and committed to lifelong learning.

Monument Impact's Promotores

Promotores are local leaders who have a depth of relationships within the Spanish-speaking community in Central Contra Costa County. Highly trained by Monument Impact, they work across multiple programs, serving as health promoters, community advocates, instructors and trainers to deliver community-led programs directly to local residents. MI currently works with over 20 promotores in our Healthy Community and Community Engagement programs, utilizing an effective Train the Trainers model that helps expand local residents' leadership skills to serve as advocates or new Promotores in our programs. They often have the capacity to reach more people than our staff can on a daily basis.

Stand Together CoCo Promotores

We are seeking four bilingual (Spanish/English) promotores with relationships in the Spanish-speaking immigrant community in Central Contra Costa County. Reporting to the Stand Together Coordinator, these Promotores will serve as dispatchers (taking one shift per week) for the new Stand Together CoCo rapid response Hotline. As the first point of contact for family members with a loved one who is being detained by ICE, Promotores help connect detainees to legal support and volunteer family accompaniment teams. Training in how to manage the Hotline and in legal observation will be provided.

Responsibilities:

- Take one Hotline shift per week in collaboration with the other Central, East and West County dispatchers and MI's Stand Together Coordinator and Organizer.
- Work with this new network of legal and advocacy partners to provide outreach into immigrant communities impacted by deportation and criminalization of immigrants for workshops and leadership trainings.
- Help support newly formed Central County volunteer Leadership Council by helping identify community volunteers.
- Serve as dispatch trainers to volunteers and new dispatchers.
- Be available to be trained in the Hotline platform and in leadership and other relevant skills

Qualifications:

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- Must be Bilingual (Spanish/English) and a local resident, ideally in Central Contra Costa County
- Minimum 1-2 years of experience as a community volunteer or managing volunteer programs
- Excellent communication skills and demonstrated ability to be empathetic, caring and calm, especially when working with community members in crisis.
- Ability to work as part of a team and independently to manage priorities, and prioritize workflow with minimal supervision.
- Willingness to work off-site majority of the time.
- Able to work some evenings and weekends as needed to carry out program activities.
- Must have a social security card or tax ID number to be able to work as a contractor

Compensation

- This is a contracted position of 7 hours per week.
- Stipend is \$15 per hour

Application Process

Applicants should submit an email expressing interest and qualifications written in Spanish or English to lorena@monumentimpact.org with the Subject Line: **Stand Together Promotora/e.**

Monument Impact is an Equal Opportunity Employer

Stand Together CoCo Coordinator
DRAFT POSITION DESCRIPTION
.50 Time

Located in Concord, CA, Monument Impact (MI) seeks a part-time (20 hours/week), bilingual (Spanish/English), empathetic and self-motivated individual to join the MI team to coordinate our engagement in Stand Together CoCo, a rapid response and community education project designed to support safety and justice for immigrant families in Contra Costa. The mission of Stand Together CoCo is to ensure that all people in Contra Costa County, regardless of citizenship or immigration status, are afforded the rights established by the United States Constitution, and are protected from actions or policies that result in disparate, discriminatory, or unlawful treatment. The program includes pro bono legal services, a Hotline and community outreach, education and leadership development trainings.

This is a unique opportunity during very unsettling times to make a significant difference in the lives of our predominately low-income, immigrant community and to be part of a movement for equity in Contra Costa County. Monument Impact is looking for an experienced community organizer who can support and engage the community in Stand Together CoCo and coordinate the community-based Promotores who will cover some of the Hotline shifts. This position reports to MI's Community Engagement Manager and will work collaboratively with all Stand Together CoCo Central Contra Costa and other regional partners.

About Monument Impact

Monument Impact's vision is to empower people to build a strong and vibrant quality of life. Our mission is to engage with the community to provide training and tools in order for people to become economically self-sufficient, healthy and safe, civically engaged, connected to each other, and committed to lifelong learning.

Job Responsibilities:

- Create and lead training of new Promotores who serve as dispatchers on hotline, including developing necessary training materials in collaboration with the program's lead partner, Catholic Charities of the East Bay, and other organizers working in East and West County.
- Troubleshoot and coordinate technical problems on the hotline.
- Manage and create Central Contra Costa County hotline schedule in collaboration with coordinators of the East and West County dispatchers to ensure the hotline is active and running 24/7.
- Manage and establish volunteer program for hotline as well as support for families with a loved one who has been detained.
- Coordinate and facilitate meetings to ensure all activities are carried out.
- Prepare monthly reports on service deliverables and work with MI's accountant on invoicing to funders.
- Collaborate on the development of informational materials about Stand Together CoCo, as needed.

Catholic Charities of the East Bay (Lead Applicant)
Response to Contra Costa RFP #1710-260
Attachment D: Project Resumes & Job Descriptions

- Communicate and respond to informational request about the hotline.
- Take at one shift/week on the hotline and provide translation for hotline calls as needed.
- Work with lead agency on tracking outcomes and prepare written reports.

Qualifications:

- Associate's degree and two years of community engagement program coordination/management **or** equivalent combination of education and experience
- Must be fully bilingual (English/Spanish), both verbal and written.
- Some experience with crisis intervention systems is ideal.
- Experience managing volunteers.
- Strong administrative background, attention to detail, and organizational, problem-solving, and analytical skills.
- Strong technical skills, ability to operate and navigate the Stand Together CoCo rapid response program; database experience helpful.
- Ability to work collaboratively as part of a team and independently to manage priorities, and prioritize workflow with minimal supervision.
- Willingness to work off-site as needed.
- Able to work some evenings and weekends as needed to carry out program activities.

Compensation and Benefits

- This is a part-time, non-exempt position, 20 hours/week.
- Compensation is \$14-15/hour.
- Benefits include medical, dental and vision, paid holidays and vacation.

Application Process

Qualified applicants should submit a resume, cover letter and three references to info@monumentimpact.org with the Subject Line: **Stand Together COORDINATOR.**

Stand Together CoCo Organizer
DRAFT POSITION DESCRIPTION
.75 Time

Located in Concord, CA, Monument Impact (MI) seeks a full-time equivalent (30 hours/week), bilingual (Spanish/English), empathetic and self-motivated immigrant rights organizer to join the MI team to build Central Contra Costa County residents' engagement in Stand Together CoCo, a new rapid response and community education project designed to support safety and justice for immigrant families in Contra Costa. The program includes pro bono legal services, a Hotline, and community outreach, education and leadership development trainings.

This is a unique opportunity during very unsettling times to make a significant difference in the lives of our predominately low-income, immigrant community and to be part of a movement for equity in Contra Costa County. Monument Impact is looking for an experienced community organizer to organize events and trainings with our Stand Together partners around "Know Your Rights" and to provide a kit of "protection tools" with the a newly established network of immigrant and advocacy partners.

About Monument Impact

Monument Impact's vision is to empower people to build a strong and vibrant quality of life. Our mission is to engage with the community to provide training and tools in order for people to become economically self-sufficient, healthy and safe, civically engaged, connected to each other, and committed to lifelong learning.

Job Responsibilities:

- Co-organize events with the newly formed Stand Together CoCo in Central Contra Costa County, working with organizers and/or coordinators from West and East County.
- Co-organize trainings around "Know Your Rights" and provide a kit of "protection tools" with this new network of legal and advocacy partners to immigrant communities impacted by deportation and criminalization of immigrants.
- Support MI's Community Engagement Manager in base-building in Concord and other Central County cities and Stand Together organizing efforts designed to expand educational and legal resources for immigrants.
- Working with MI's Stand Together Coordinator, recruit and train volunteers to establish an engaged Leadership Council of volunteers that can help support the Hotline as well as accompany families if a loved one is detained.
- Organize in local schools and faith communities to provide information about the program and identify leaders and volunteers.
- Work with MI's Community Engagement Manager to coordinate Leadership Development and Train the Trainer trainings; work with MI's Promotores to help with outreach in the community.
- Take shifts on the hotline and provide translation for hotline calls as needed.

Qualifications:

Catholic Charities of the East Bay (Lead Applicant)
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- Bachelor's degree and two years of community organizing, program coordination/management or equivalent combination of education and experience
- Must be fully bilingual (English/Spanish), both verbal and written
- Minimum two years of experience with crisis intervention systems is ideal
- Minimum 1-2 years of experience managing volunteer programs.
- Strong administrative background, attention to detail, and organizational, problem-solving, and analytical skills.
- Strong technical skills, ability to operate and navigate the Stand Together CoCo rapid response program
- Ability to work as part of a team and independently to manage priorities, and prioritize workflow with minimal supervision.
- Willingness to work off-site majority of the time.
- Able to work some evenings and weekends as needed to carry out program activities.

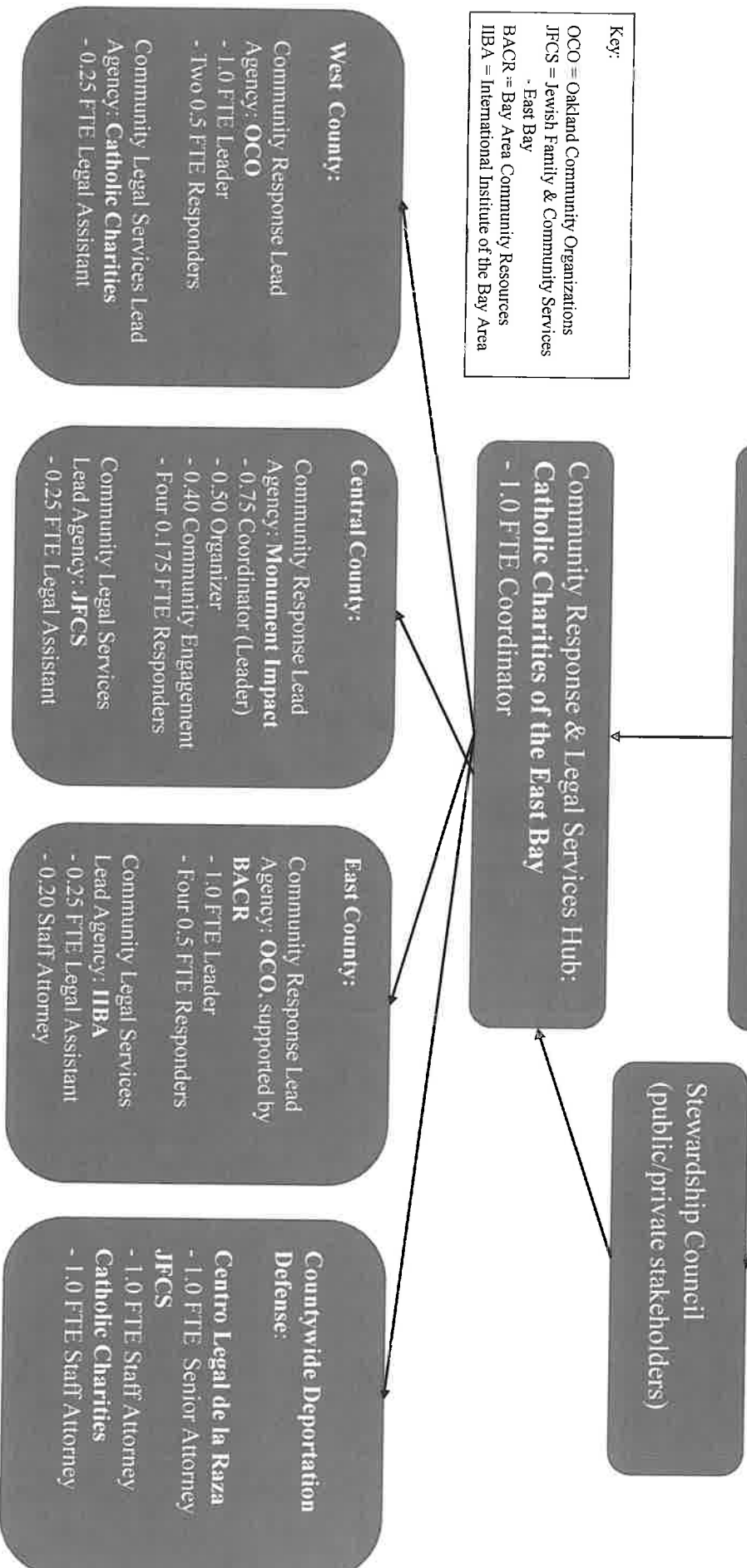
Compensation and Benefits

- This is a .75 time position (30 hours/week), non-exempt position
- Starting salary is \$17/hour
- Benefits include medical, dental and vision, paid holidays and vacation.

Application Process

Qualified applicants should submit a resume, cover letter and three references to info@monumentimpact.org with the Subject Line: **Stand Together ORGANIZER.**

Catholic Charities of the East Bay
(Lead Applicant)
Response to Contra Costa RFP
#1710-260
Attachment E: Organizational Chart



Catholic Charities of the East Bay (Lead Applicant)
Response to Contra Costa RFP #1710-260
Section 4: Attachments
F: Applicant Statement of Qualifications (Form #3)

Following this page is Form #3 signed by our Chief Executive Officer and Board Chair:

Applicant Statement of Qualifications (Form #3): This completed form must be signed by Agency Executive Director and President of Agency Board of Directors or equivalent body.

C. APPLICANT'S QUESTIONNAIRE (FORM #3)

1. List any licenses or certifications held by the agency, with expiration dates.

Business License Oakland, Expiration 12/2017

Business License Concord, Expiration 12/2017

Business License San Pablo, Expiration 9/2018

Alameda County Small Local Emerging Business, Expiration 7/2019

2. Who administers your agency's fiscal system?

- Name: Sean Hanlon
- Title: Chief Financial Officer
- Relevant Credentials: Certified Public Accountant
- Phone: (510) 768-3130

3. What entity maintains or reviews the agency's financial records and audit, if applicable?

- Name: Harrington Group
- Title: Certified Public Accountants, LLP
- Phone: (415) 391-3131

4. Number of years bidder operated under the present business name. 52

- List related prior business names, if any, and timeframe for each.

The Affiliated Catholic Charities of Alameda County: 1935-1945

Catholic Social Service of Alameda County: 1945-1965

Catholic Charities of the Diocese of Oakland (DBA Catholic Charities of the East Bay):
1965-present

5. Number of years bidder has provided the services described in this proposal or related services. 37

6. Has bidder failed or refused to complete any contract? Yes _____ No X

- If yes, briefly explain when and circumstances.

7. Is there any past, present, or pending litigation in connection with contracts for services involving the bidder or any principal officer of the agency? Yes _____ No X

- If yes, briefly explain.

8. Does bidder have a controlling interest in any other firm(s)? Yes _____ No X

- If yes, please list entities below.

8. Does bidder have commitments or potential commitments that may impact assets, lines of credit or otherwise affect agency's ability to fulfill this RFP? Yes _____ No X

- If yes, specify below.

Bidder attests, under penalty of perjury, that all information provided herein is complete and accurate. Bidder agrees to provide to County other information the County may request as necessary for an accurate determination of bidder's qualifications to perform proposed services.

Chuck Fernandez, Chuck Fernandez. 11/17/17
Executive Director: Signature, Name and Date

John A. Espinoza, John Espinoza, Bonno Lima 11-17-17
Board President: Signature, Name and Date

Catholic Charities of the East Bay (Lead Applicant)
Response to Contra Costa RFP #1710-260
Section 4: Attachments
G: Applicant Contracts and Grants (Form #4)

Following this page is Form #4 signed by our Chief Executive Officer and Board Chair, and Form #4 signed by all funded partners participating this project:

Applicant Contracts and Grants (Form #4): This completed form must be signed by Agency Executive Director and President of Agency Board of Directors or equivalent body.

D. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
<u>Alameda County: Know Your Rights</u> Naima Jameson, 510-267-8632, Naima.Jameson@acgov.org	<u>Know Your Rights presentations throughout Alameda County.</u>	<u>July 1, 2017 – June 30, 2019</u>
<u>CA Department of Social Services</u> (Subcontract through Catholic Charities CA) <u>Immigration Services</u> Emily Battaglia, 530-665-0355, emily@catholiccharitiesca.org	<u>Immigration legal services including u-visa, t-visa, SIJS, asylum, naturalization, and other immigration remedies. Legal screenings and consultations. Community information sharing through events, outreach, and media.</u>	<u>January 1, 2017 – December 31, 2017</u>
<u>Y&H Soda Foundation</u> Mary Doyle, 925-631-1133 ext. 105, mdoyle@yhsodafoundation.org	<u>Immigration legal services, community outreach, and education in Alameda and Contra Costa Counties.</u>	<u>May 1, 2017 – April 30, 2018</u>
<u>Zellerbach Family Foundation</u> Navin Moul, 415-421-2629 ext. 16, navin.moul@zff.org	<u>Immigration legal services, community outreach, and education in West Contra Costa County.</u>	<u>December 6, 2016 – December 5, 2017</u>

2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
<u>CA Department of Social Services</u> (Subcontract through Catholic Charities CA) <u>Unaccompanied Undocumented Minor Immigration Legal Services</u> Emily Battaglia, 530-665-0355, emily@catholiccharitiesca.org	<u>Immigration legal services for Unaccompanied Undocumented Minors including SIJS, u-visas, and asylum.</u>	<u>January 1, 2016 – December 31, 2016</u>
<u>CA Department of Social Services</u> (Subcontract through Catholic Charities CA) <u>Immigration Services</u> Emily Battaglia, 530-665-0355, emily@catholiccharitiesca.org	<u>Immigration legal services including u-visa, t-visa, SIJS, asylum, naturalization, and other immigration remedies. Legal screenings and consultations. Community information sharing</u>	<u>January 1, 2016 – December 31, 2016</u>

	<u>through events, outreach, and media.</u>	
<u>Alameda County: Refugee Employment and Support Services</u> Please see below.	<u>ESL, case management, computer literacy training, and job readiness and job placement for refugees.</u>	<u>June 1, 2015 – May 31, 2016</u>
<u>Alameda County: Refugee Technical Assistance</u> Please see below.	<u>Social adjustment, cultural orientation, job readiness and job placement, direct assistance for public transportation, and support services for refugees.</u>	<u>October 1, 2016 - September 30, 2017</u>

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. **(Sign below)**

Chuck Fernandez, Chuck Fernandez. 11/17/17

Executive Director: Signature, Name and Date

John A. Espinoza, JOHN ESPINOZA Board Chair 11-17-17

Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

Name/Phone/Email for above

Alameda County grants:

Naima Jameson, 510-267-8632,

Naima.Jameson@acgov.org

D. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
Minnie Yang, CDSS / 916 -651-8012 / Minnie.yang@dss.ca.gov	Legal services for unaccompanied minors	7.1.2017-9.30.2018
Minnie Yang, CDSS ISF / 916-651-8012 / Minnie.yang@dss.ca.gov	Removal defense for youth and adults	1.1.2018-12.31.2019
Mary Doyle, Y&H Soda Foundation / 925-631-1133 / mdoyle@yhsodafoundation.org	Legal services for unaccompanied minors and families; and removal defense	7.1.2017-6.30.2018
Navin Moul, Zellerbach Foundation/ 415-421-2629 / Navin.moul@zff.org	PRAP	9.1.2017-9.1.2018

2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
Stephanie Hom, City of Oakland / Shom@oakland.net.com	Legal services for unaccompanied minors and families	7.1.2016-6.30.2017
Minnie Yang, CDSS / 916 -651-8012 / Minnie.yang@dss.ca.gov	Legal services for unaccompanied minors	7.1.2016-9.30.2017
Samantha Sandoval, Latino Giving Circle / 415 – 236-4021 / ssandoval@latinocf.org	DACA	11.1.2016-10.31.2017
Ayush Chakravarty, Yahoo Employees / 669-246-2824 / Ayushc@yahoo.com	PRAP	9.1.2016-9.1.2017

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. **(Sign below)**

Paul C. Chavez Paul C. Chavez Nov. 27, 2017

Executive Director: Signature, Name and Date

Rosanna Neagle Rosanna Neagle, November 27, 2017

Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

Jewish Family & Community Services East Bay

A. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

The following are key current contracts and grants.

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
Alameda County Behavioral Health Care Services <i>Ellen Muir (510) 639-1340</i>	outpatient mental health services, EPSDT	7/1/17-6/30/18
California Department of Social Services <i>Odet Ford (916)-651-8007</i>	immigration legal services	1/1/17-12/31/17
City of Oakland Head Start <i>Wenonah Elms (510) 238-7602</i>	preschool-based mental health consultation	8/21/17-6/30/18
Conference for Material Claims Against Germany <i>Joelle Sklaar (646) 485-2128</i>	Holocaust survivor services	1/1/17-12/31/17
Contra Costa Employment and Human Services/Area Agency on Aging <i>Scott Danielson (925) 313-1717</i>	caregiver support services	7/1/17-6/30/18
Contra Costa Family and Children's Trust Committee <i>Juliana Mondragon (925) 313-1696</i>	multicultural child abuse prevention	7/1/17-6/30/18
Contra Costa Mental Health Services <i>Warren Hayes (925) 957-5154</i>	prevention and early intervention mental health services	7/1/17-6/30/18
Family Paths <i>Marcella Reeves (510) 893-9230</i>	preschool-based mental health consultation	7/1/17-6/30/18
First 5 Alameda County <i>Janis Burger (510) 618-3456</i>	preschool-based mental health consultation	7/1/17-6/30/18
HIAS <i>Myat Lin (301) 844-7285</i>	refugee resettlement	10/1/17-9/30/18
HIAS <i>Myat Lin (301) 844-7285</i>	Preferred Communities refugee case management	10/1/17-9/30/18
Jewish Federations of North America <i>Leah Bergen (202) 736-5885</i>	Holocaust survivor services	3/1/17-2/28/18
Oakland Fund for Children and Youth <i>Sandra Taylor (510) 238-7163</i>	preschool-based mental health consultation	7/1/17-6/30/18

Unity Council Head Start <i>Lucy Arrizon (925) 798-1013</i>	preschool-based mental health consultation	9/1/17-5/31/18
van Loben Sels/Rembe Rock Foundation <i>Nancy Wiltsek (415) 512-0500</i>	immigration legal services	5/1/17-4/30/18
Y & H Soda Foundation <i>Mary Doyle (925) 631 1133</i>	immigration legal services	1/1/17-12/31/17

2. List key contracts/grants completed in the last five years, including government contracts/grants


Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
FY13		
Alameda County Behavioral Health Care Services	outpatient mental health services, EPSDT	7/1/12-6/30/13
Conference for Material Claims Against Germany	Holocaust survivor services	1/1/13-12/31/13
Contra Costa Employment and Human Services/Area Agency on Aging	multicultural caregiver support services	7/1/12-6/30/13
Contra Costa Family and Children's Trust Committee	multicultural child abuse prevention	7/1/12-6/30/13
Contra Costa Mental Health Services	prevention and early intervention mental health services	7/1/12-6/30/13
Every Child Counts: Alameda County First 5 Commission	preschool-based mental health consultation	7/1/12-6/30/13
Every Child Counts: Alameda County First 5 Commission	preschool-based mental health consultation	1/1/12-6/30/13
Every Child Counts: Alameda County First 5 Commission	family support services in emergency shelters and recovery program	7/1/12-6/30/13
Hebrew Immigrant Aid Society/Office of Refugee Resettlement	LGBTI refugee resettlement	9/30/12-9/29/13
Oakland Fund for Children and Youth	preschool-based mental health consultation	7/1/12-6/30/13
Walter & Elise Haas Fund (subcontracted through Jewish Community Federation of San Francisco)	emergency financial assistance and case management	11/29/12-11/29/13
Y & H Soda Foundation	immigration legal services	7/1/11-6/30/13
FY14		
Alameda County Behavioral Health Care Services	outpatient mental health services, EPSDT	7/1/13-6/30/14

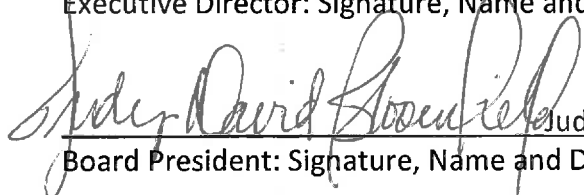
Conference for Material Claims Against Germany	Holocaust survivor services	1/1/14-12/31/14
Contra Costa Family and Children's Trust Committee	multicultural child abuse prevention	7/1/13-6/30/14
Contra Costa Mental Health Services	prevention and early intervention mental health services	7/1/13-6/30/14
Family Paths	preschool-based mental health consultation	7/1/13-6/30/14
First 5 Alameda County	preschool-based mental health consultation	7/1/13-6/30/14
First 5 Alameda County	family support services in emergency shelters and recovery program	7/1/13-6/30/14
HIAS/Office of Refugee Resettlement	LGBTI refugee resettlement	9/30/13-9/29/14
Oakland Fund for Children and Youth	preschool-based mental health consultation	7/1/13-6/30/14
Y & H Soda Foundation	immigration legal services	7/1/13-6/30/14
FY15		
Alameda County Behavioral Health Care Services	outpatient mental health services, EPSDT	7/1/14-6/30/15
Conference for Material Claims Against Germany	Holocaust survivor services	1/1/15-12/31/15
Contra Costa Employment and Human Services/Area Agency on Aging	multicultural caregiver support services	7/1/14-6/30/15
Contra Costa Family and Children's Trust Committee	multicultural child abuse prevention	7/1/14-6/30/15
Contra Costa Mental Health Services	prevention and early intervention mental health services	7/1/14-6/30/15
Family Paths	preschool-based mental health consultation	7/1/14-6/30/15
First 5 Alameda County	preschool-based mental health consultation	7/1/14-6/30/15
First 5 Alameda County	family support services in emergency shelters and recovery program	7/1/14-6/30/15
HIAS	refugee resettlement	10/1/14-9/30/15
HIAS	LGBTI refugee resettlement	10/1/14-9/30/15
Oakland Fund for Children and Youth	preschool-based mental health consultation	7/1/14-6/30/15
Y & H Soda Foundation	immigration legal services	1/1/15-12/31/15
FY16		
Alameda County Behavioral Health Care Services	outpatient mental health services, EPSDT	7/1/15-6/30/16

California Department of Social Services	immigration legal services	1/1/16-6/30/17
Conference for Material Claims Against Germany	Holocaust survivor services	1/1/16-12/31/16
Contra Costa Employment and Human Services/Area Agency on Aging	multicultural caregiver support services	7/1/15-6/30/16
Contra Costa Family and Children's Trust Committee	multicultural child abuse prevention	7/1/15-6/30/16
Contra Costa Mental Health Services	prevention and early intervention mental health services	7/1/15-6/30/16
Family Paths	preschool-based mental health consultation	7/1/15-6/30/16
First 5 Alameda County	preschool-based mental health consultation	7/1/15-6/30/16
First 5 Alameda County	family support services in emergency shelters and recovery program	7/1/15-6/30/16
HIAS	refugee resettlement	10/1/15-9/30/16
HIAS	LGBTI refugee resettlement	10/1/15-9/30/16
Jewish Federations of North America	Holocaust survivor services	3/1/16-2/28/17
Oakland Fund for Children and Youth	preschool-based mental health consultation	7/1/15-6/30/16
Oakland Public Education Foundation	preschool-based mental health consultation	9/1/15-8/31/16
Y & H Soda Foundation	immigration legal services	1/1/16-12/31/16
FY17		
Alameda County Behavioral Health Care Services <i>Ellen Muir (510) 639-1340</i>	outpatient mental health services, EPSDT	7/1/16-6/30/17
California Department of Social Services <i>Odet Ford (916)-651-8007</i>	immigration legal services	1/1/17-12/31/17
Conference for Material Claims Against Germany <i>Joelle Sklaar (646) 485-2128</i>	Holocaust survivor services	1/1/17-12/31/17
Contra Costa Employment and Human Services/Area Agency on Aging <i>Scott Danielson (925) 313-1717</i>	caregiver support services	7/1/16-6/30/17
Contra Costa Family and Children's Trust Committee <i>Juliana Mondragon (925) 313-1696</i>	multicultural child abuse prevention	7/1/16-6/30/17

Contra Costa Mental Health Services <i>Warren Hayes (925) 957-5154</i>	prevention and early intervention mental health services	7/1/16-6/30/17
Family Paths <i>Marcella Reeves (510) 893-9230</i>	preschool-based mental health consultation	7/1/16-6/30/17
First 5 Alameda County <i>Janis Burger (510) 618-3456</i>	preschool-based mental health consultation	7/1/16-6/30/17
First 5 Alameda County <i>Janis Burger (510) 618-3456</i>	family support services in emergency shelters and recovery program	7/1/16-6/30/17
HIAS <i>Myat Lin (301) 844-7285</i>	LGBTI refugee resettlement	10/1/16-9/30/17
HIAS <i>Myat Lin (301) 844-7285</i>	refugee resettlement	10/1/16-9/30/17
Jewish Federations of North America <i>Leah Bergen (202) 736-5885</i>	Holocaust survivor services	3/1/17-2/28/18
John Muir/Mt. Diablo Community Health Fund <i>Lillian Roselin (925) 941-3100</i>	refugee health project	8/1/16-7/30/17
Oakland Fund for Children and Youth <i>Sandra Taylor (510) 238-7163</i>	preschool-based mental health consultation	7/1/16-6/30/17
Y & H Soda Foundation <i>Mary Doyle (925) 631 1133</i>	immigration legal services	1/1/17-12/31/17

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. **(Sign below)**

 Avi Rose, 11/17/ 2017
Executive Director: Signature, Name and Date

 Judy David Bloomfield, 11/20/ 2017
Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

A. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
California Department of Social Services, Jocelyn Gutierrez, 916-651-8008 Jocelyn.gutierrez@dss.ca.gov	Immigration legal services, and community education & outreach	1/1/17 – 12/31/17 & 1/1/18 – 12/31/18
Department of Homeland Security, Marsha Brookins, 202-272-1292, marsha.r.brookins@uscis.dhs.gov	Naturalization Legal Services and Citizenship Education	10/1/2017 – 9/30/2017
Y & H Soda Foundation, Mary Doyle, 925-631-1133 ext. 105, mdoyle@yhsodafoundation.org	Immigration Legal Services	1/1/17 -12/31/17
Zellerbach Family Foundation, Navin Moul, 415-421-2629 x16, navin.moul@zff.org	Immigration Legal Services	10/1/17 – 9/30/17

2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
County of Alameda, Ramil Rivera, 510-271-9165, RCRivera@acgov.org	Immigration Legal Services for low-income survivors of domestic violence and sexual assault	7/1/17 – 6/30/18
San Francisco Dept. of Public Health, Patricia Erwin, (415) 581-2418, patricia.erwin@sfdph.org	Medical Interpretation and Education in collaboration with Newcomers Health Program	10/1/2017 – 10/1/2018
San Francisco Office of Civic Engagement & Immigrant Affairs, Richard Whipple, (415) 581-2365 Richard.Whipple@sfgov.org	Immigration Legal Services	7/1/17 – 6/30/18
San Francisco Dept. of Aging and Adult Services, Michael	Citizenship Education and Legal Services	7/1/17 – 6/30/18

Zaugg, 415-355-6790, Michael.zaugg@sfgov.org		
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3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. **(Sign below)**

Ellen Dumesnil, Ellen Dumesnil 11/21/2017

Executive Director: Signature, Name and Date

Jennifer Beckett, Jennifer Beckett 11/21/2017

Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

Monument Impact
Form #4: Response to Contra Costa RFP
#1710-260

A. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
John Rees CalWORKs, Refugee Cash Assistance Analyst 925-608-4934 JREES@ehsd.cccounty.us	Comprehensive Job Services for Limited English Proficient CalWORKs Welfare to Work Participants	9/1/2017-6/30/2018
Brenda Kain Housing/Community Services Manager, City of Concord (925) 671-3088 Brenda.Kain@cityofconcord.org	CBDG Grant – Technology Empowerment & Small Business Support	8/1/2017-6/30/2018
Laura Simpson, AICP Planning and Housing Manager City of Concord (925) 671-3369 Laura.Simpson@cityofconcord.org	Monument Community Shuttle – free shuttle to Monument residents with 2 routes to key service centers and Downtown	9/1/2015 – until Measure J funding runs out (at least through August 2019)
Denice A. Dennis, MPH Tobacco Prevention Manager Contra Costa Health Services phone: 925-313-6825 Denice.Dennis@hscd.cccounty.us	Tobacco Control advocacy to address marketing of flavored tobacco products to low-income communities of color and in close proximity to schools in Concord	9/1/2015-6/30/2020
Amy Weiss Director of Refugee & Immigrant Services Jewish Family & Community Services East Bay (925) 927-2000, ext. 626 aweiss@jfcs-eastbay.org	CDSS Subcontract to provide outreach, education and legal services to Spanish-speaking immigrants at Monument Impact	1/1/2017-12/31/2017 New: 1/1/2018-12/31/2018
Aimee Durfee Sr. Program Officer Y&H Soda Foundation (925) 631-1133 x109 Adurfee@yhsodafoundation.org	Family Economic Success: General operating and strategic planning consultant	Grant 1: 1/1/2017-12/31/2017 Grant 2: 11/1/2017-3/31/2017
Landon Williams Senior Director, Anchoring Communities San Francisco Foundation (415) 733-8500 llwilliams@sff.org	Leadership Development, Mentees Positivas, general operating	Grant 1: 6/1/2017-5/31/2018 Grant 2: 11/1/2017-10/31/2018
David Pontecorvo Sr. Program Officer East Bay Community Foundation (510) 836-3223 dpontecorvo@eastbaycf.org	General operating	Grant 1: 2/15/2017-12/30/2017 Grant 2: TBD
Melissa Stafford-Jones Executive Director	Technology for Success	12/1/2017-12/1/2019


Dean & Margaret Lesher Foundation Office: 925 935 9988 msj@lesherfoundation.org		
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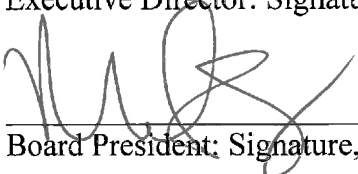
2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
John Rees CalWORKs, Refugee Cash Assistance Analyst 925-608-4934 JREES@ehsd.cccounty.us	Comprehensive Job Services for Limited English Proficient CalWORKS Welfare to Work Participants	7/1/2016-8/31/2017 7/1/2015-6/30/2016 11/1/2014- 6/30/2015 7/1/2013-6/30/2014* 12/1/2012-6/30/2013* *MI was a merger of 2 organizations. These contracts were under our predecessor CCEDO-Michael Chavez Center
Brenda Kain Housing/Community Services Manager, City of Concord (925) 671-3088 Brenda.Kain@cityofconcord.org	CBDG Grant – Technology Empowerment & Small Business Support	7/1/2016-6/30/2017 7/1/2015-6/30/2016
Amy Weiss Director of Refugee & Immigrant Services Jewish Family & Community Services East Bay (925) 927-2000, ext. 626 aweiss@jfccs-eastbay.org	CDSS Subcontract to provide outreach, education and legal services to Spanish-speaking immigrants at Monument Impact	7/1/2016-6/31/2017 (MI completed contract through 12/31/2016)
Alejandra Chamberlain Youth Development Services Manager, CCCOE (925) 942-3308 AChamberlain@cccoe.k12.ca.us	Youth Development Services, out of school youth	7/1/2016-6/30/2017 7/1/2015-6/30/2016 7/1/2014-6/30/2015
Aimee Durfee Sr. Program Officer Y&H Soda Foundation (925) 631-1133 x109 Adurfee@yhsodafoundation.org	Family Economic Success: General operating and strategic planning consultant	Have funded annually since 2010
Landon Williams Senior Director, Anchoring Communities San Francisco Foundation (415) 733-8500 lwilliams@sff.org	Leadership Development, Mentees Positivas, general operating	Have funded annually for over a decade
David Pontecorvo Sr. Program Officer East Bay Community Foundation (510) 836-3223	General operating	Have funded annually since 2010

dpontecorvo@eastbaycf.org		
Melissa Stafford-Jones Executive Director Dean & Margaret Lesher Foundation Office: 925 935 9988 msj@lesherfoundation.org	Technology for Success	8/1/2014-8/30/2017

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. **(Sign below)**

 DEBRA BERNSTEIN 11/20/17
Executive Director: Signature, Name and Date

 Michael Chong 11/20/2017
Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

A. APPLICANT CONTRACTS AND GRANTS (FORM #4)

1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
<u>Oakland School of Language/Oakland Public Education Fund</u>	<u>Parent outreach and community organizing</u>	<u>9/1/2016-9/1/2017</u>
<u>East Bay Asian Youth Center</u>	<u>Community organizing/nonpartisan civic engagement for the East Oakland Congress of Neighborhoods</u>	
<u>PICO California</u>	<u>California Department of Social Services re-grant: Immigration outreach, training: Know Your Rights, DACA, citizenship</u>	<u>1/1/2017-12/31/2017</u>
<u>Centro Legal de La Raza</u>	<u>Immigration outreach, training: Know Your Rights, DACA, citizenship</u>	<u>3/1/2017-3/1/2018</u>

2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
<u>James Irvine Foundation</u>	<u>Community organizing for civic leadership development of local residents</u>	<u>7/2017-7/2019</u>
<u>California Endowment</u>	<u>Community organizing for civic leadership development of local residents</u>	<u>7/2016-7/2018</u>
<u>PICO California</u>	<u>California Department of Social Services re-grant: Immigration outreach, training: Know Your Rights, DACA, citizenship</u>	<u>1/2016-12/2017</u>
<u>Y&H Soda Foundation</u>	<u>Community organizing for civic leadership development of local residents</u>	<u>11/2017</u>

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. (Sign below)

George A. Cummings, GEORGE CUMMINGS,
Executive Director: Signature, Name and Date 11/21/18

Michael Wallace, Michael WALLACE,
Board President: Signature, Name and Date 11/21/18

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

D. APPLICANT CONTRACTS AND GRANTS (FORM #4)

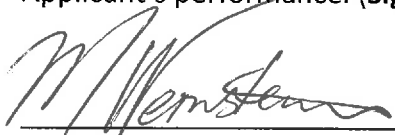
1. List current contracts and subcontracts including government contracts and/or grants:

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
CCC Workforce Dev Board Gina Del Carlo 925-671-4544 gdelcarlo@ehsd.cccounty.us	Case management, job placement and academic advising.	2014-Current
Youth Justice Initiative Rebecca Brown 510-243-0122 rebecca@furtherthework.com	Case management and transition support for youth leaving juvenile detention.	2016-Current
CCC Reentry and Justice Donté Blue 925-335-1977 Donte.Blue@cao.cccounty.us	Case management and transition support for young adults leaving county jail.	2017-Current
CCC Behavioral Health Services Helen Kearns 925-957-5125 HKearns@hsd.cccounty.us	Therapy, case management, crisis intervention and family consultation.	2005-Current

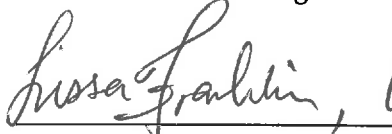
2. List key contracts/grants completed in the last five years, including government contracts/grants

Contact Name/Phone/Email of Funder	Services Provided Under Contract	Contract Start/End Dates
City of San Pablo Bertha Romo 510-215-3087 bertha@sanpabloca.gov	Mental health counseling-therapy and restorative justice programming at both an elementary and middle school.	2013-2015
CCC Reentry and Justice Donté Blue 925-335-1977 Donte.Blue@cao.cccounty.us	Court advocacy, job training and paid work experience for juveniles on probation.	2015-2017

3. Applicant agrees to allow County to contact contractors for information relative to Applicant's performance. (Sign below)

 Martin Weinstein, 11/27/17

Executive Director: Signature, Name and Date

 Lissa Franklin, 11/27/2017

Board President: Signature, Name and Date

Note: When more than one agency will collaborate in providing services(s), each agency involved must complete this form.

Catholic Charities of the East Bay (Lead Applicant)
Response to Contra Costa RFP #1710-260

Section 4: Attachments

H: Nonprofit Determination Letter (501c3 letter) or
Current Fiscal Sponsorship Agreement

Following this page is our 501c3 letter from the Internal
Revenue Service dated May 27, 2016.

Note from the USCCB Office of General Counsel: The EIN below belongs to the USCCB and is to be used **only** to confirm that the USCCB as group ruling holder is recognized by the IRS as a 501(c)(3) organization. It is not to be used by **any** other organization in the group ruling **for any purpose**. Every subordinate organization in the group ruling has its own EIN that must be used for all official purposes.

Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201

Department of the Treasury

Date: May 27, 2016

Person to Contact:

R. Meyer ID# 0110429

Toll Free Telephone Number:

877-829-5500

Employer Identification Number:

53-0196617

Group Exemption Number:

0928

For use by
the USCCB
only.

United States Conference of Catholic
Bishops
3211 4th Street, NE
Washington, DC 20017-1194

Dear Sir/Madam:

This responds to your May 23, 2016, request for information regarding the status of your group tax exemption.

Our records indicate that you were issued a determination letter in March 1946, that you are currently exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, and are not a private foundation within the meaning of section 509(a) of the Code because you are described in sections 509(a)(1) and 170(b)(1)(A)(i).

With your request, you provided a copy of the *Official Catholic Directory for 2016*, which includes the names and addresses of the agencies and instrumentalities and the educational, charitable, and religious institutions operated by the Roman Catholic Church in the United States, its territories, and possessions that are subordinate organizations under your group tax exemption. Your request indicated that each subordinate organization is a non-profit organization, that no part of the net earnings thereof inures to the benefit of any individual, and that no substantial part of their activities is for promotion of legislation. You have further represented that none of your subordinate organizations is a private foundation under section 509(a), although all subordinates do not all share the same sub-classification under section 509(a). Based on your representations, the subordinate organizations in the *Official Catholic Directory for 2016* are recognized as exempt under section 501(c)(3) of the Code under GEN 0928.

Donors may deduct contributions to you and your subordinate organizations as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to them or for their use are deductible for federal estate and gifts tax purposes if they meet the applicable provisions of section 2055, 2106, and 2522 of the Code.

Subordinate organizations under a group exemption do not receive individual exemption letters. Most subordinate organizations are not separately listed in Publication 78 or the EO Business Master File. Donors may verify that a subordinate organization is included

in your group exemption by consulting the *Official Catholic Directory*, the official subordinate listing approved by you, or by contacting you directly. IRS does not verify the inclusion of subordinate organizations under your group exemption. See IRS Publication 4573, *Group Exemption*, for additional information about group exemptions.

Each subordinate organization covered in a group exemption should have its own EIN. Each subordinate organization must use its own EIN, not the EIN of the central organization, in all filings with IRS.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

A handwritten signature in dark ink, appearing to read 'J. Cooper', with a stylized flourish at the end.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

89283103 L

CATHOLIC CHARITIES OF THE DIOCESE
OF OAKLAND
433 JEFFERSON ST
OAKLAND

CA 94607

Date of This Notice

If you inquire about
your account, please
refer to this
number or attach a
copy of this notice

08-20-80
Employer Identification Number

94-2677202

575 B 045555555W
55555555**NOTICE OF NEW EMPLOYER IDENTIFICATION NUMBER ASSIGNED**

Thank you for your application for an employer identification number. The number above has been assigned to you. We will use it to identify your business tax returns and any other related documents, even if you have no employees.

Please keep this number in your permanent records. Use the number and your name, exactly as shown above, on all Federal tax forms that require this information, and refer to the number in all tax payments and in tax-related correspondence or documents. You may wish to make a record of the number for reference in case this notice is lost or destroyed.

We appreciate your cooperation.

Catholic Charities of the East Bay (Lead Applicant)

Response to Contra Costa RFP #1710-260

Section 4: Attachments

I: Organizational Financials

Following this page are the organizational financials as requested in the RFP:

Organizational Financials: Include the organization's current budget and balance sheet, as well as the organization's actual budget for the past two fiscal years. Provide a copy of your most recent audit. If you have not completed an audit in the past five years, explain why, and explain the process by which your annual financials and tax forms are prepared and reviewed by your governing body.

Catholic Charities of the East Bay

FY17-18 Operating Budget

REVENUE		Accrual Basis Budget
		Total
Earned Income		
Client Fees	\$	235,710
Fees for Service	\$	322,580
Total Earned Income	\$	558,290
Government Grants & Contracts		
Contracts - Federal	\$	650,207
Contracts - State	\$	1,442,506
Contracts - County	\$	282,819
Contracts - Local	\$	619,148
Total Government Income	\$	2,994,680
Foundation Grants		
Grants - Restricted	\$	1,447,044
Grants - Unrestricted	\$	131,275
Total Foundation Grants	\$	1,578,319
Development Revenue		
Appeal Contributions	\$	1,324,491
Restricted Contributions	\$	1,216,693
Auto Donations	\$	13,917
Special Events	\$	721,264
United Way Donor Options	\$	5,801
Total Development Revenue	\$	3,282,167
Other Revenue		
Fiscal Agent Fees	\$	133,000
Rent	\$	170,424
Total Other Revenue	\$	303,424
Total Revenue	\$	8,716,880
EXPENSES		Total
Personnel Expenses		
Salaries	\$	4,831,117
Fringe Rate	\$	938,148
Total Personnel Expenses	\$	5,769,266
Operating Expenses		Total
Audit fees	\$	41,250
Payroll fees	\$	7,200
Bank charges	\$	19,200
Subcontractors	\$	351,233
Volunteer stipends	\$	550
Childcare services (FLP Program)	\$	10,000
Copier Supplies & Lease	\$	32,202

Catholic Charities of the East Bay

FY17-18 Operating Budget

REVENUE	Accrual Basis Budget Total
Copy/Printing - Outside of Agency	\$ 28,768
Corporate Board Expense	\$ 2,218
Depreciation	\$ 309,500
Dues & Memberships	\$ 18,534
Employee Recruitment	\$ 13,762
Financial Assistance to Clients	\$ 215,443
Furniture & Equipment	\$ 92,649
Insurance	\$ 86,333
Mortgage Interest Expense	\$ 80,000
Equipment Leases (does not include copier)	\$ 10,000
Janitorial Services	\$ 20,400
Licenses & fees (includes software)	\$ 124,012
Meals	\$ 1,400
Miscellaneous	\$ 3,000
Postage & Shipping	\$ 27,779
Property Taxes	\$ 38,000
Public Relations	\$ 50,400
Rent	\$ 85,770
Repairs & Maintenance (vehicles, buildings, & equipment)	\$ 18,500
Security & Safety	\$ 18,250
Special Events	\$ 77,750
Client Incentives	\$ 7,000
Subscriptions & Publications	\$ 1,510
Supplies-Employee Meetings	\$ 3,654
Supplies - Sanitation & Kitchen	\$ 41,464
Supplies - Office	\$ 23,008
Supplies - Program	\$ 48,169
Supplies - Training	\$ 500
Telephone and Internet	\$ 36,000
Cells Phones & Laptops	\$ 31,219
Staff Training	\$ 24,650
Conferences & Out of Area Travel	\$ 24,657
Travel - Local & Meetings	\$ 64,187
Utilities	\$ 53,500
Total Operating Expenses	\$ 2,143,621
Total Expenses	\$ 7,912,886

Catholic Charities Balance Sheet - August 2017

(in \$ 000's)

Assets	
Cash	1,481
Cash - Held for Others	846
Total Cash	<u>2,327</u>
Grants Receivable - Government	568
Restricted Grants and Other Receivables	33
General Pledges Receivable,	666
Allowance for Uncollectability	(50)
Capital Pledges Receivable	713
Discount on Pledges Receivable	(10)
Prepays & Deposits	11
Total Current assets	<u>4,257</u>
Investments - Merrill Lynch	6,090
Investments - Cassidy	55
Charitable Remainder Trusts-Dow Trust	125
Property, Plant and Equipment, Net	<u>2,015</u>
Total Assets	<u><u>12,542</u></u>
Liabilities	
Accounts Payable and Accrued Expenses	495
Accrued Vacation	198
Funds Held for Others	846
Total Current liabilities	1,538
Mortgages Payable -Non Current	<u>1,293</u>
Total Liabilities	<u><u>2,832</u></u>
Net Assets	
Net Assets - Unrestricted	391
Net assets - Board Designated Endowment	4,358
Net Investment in Property	2,015
Net Assets - Donor Restricted Endowment	1,732
Net Assets - Temporarily Restricted	1,214
Total Net Assets	<u>9,710</u>
Total Liabilities & Net Assets	<u><u>12,542</u></u>

Catholic Charities of the East Bay
FY16-17 Operating Budget

REVENUE

Government Grants & Contracts:

Federal	\$ 875,405.00
State	\$ 543,360.00
County	\$ 307,776.00
City	\$ 515,499.67
	\$ 2,242,040.67

Private Foundation Grants:

Restricted & Unrestricted	\$ 1,476,880.00
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Contributions:

Annual Giving ¹	\$ 1,281,192.00
Special Events ²	\$ 255,834.00
	\$ 1,537,026.00

Other:

Fee for Service ³	\$ 708,839.00
Interest and Endowment Earnings	\$ 32,005.00
Prior Year Carryover ⁴	\$ 274,206.85
Aging of Net Assets ⁵	\$ 339,000.00
	\$ 1,354,050.85

TOTAL:	\$ 6,609,997.52
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EXPENSES

Personnel:

Salaries	\$ 3,968,356.00
Taxes & Benefits (@ 20% of salaries) ⁶	\$ 793,671.20
	\$ 4,762,027.20

Non-Personnel:

Audit fees	\$	39,000.00
Bank charges	\$	25,000.00
Client Incentives ⁷	\$	21,130.00
Conferences ⁸	\$	50,614.00
Copy Allocation - In-house ⁹	\$	1,578.00
Copy/Printing - Outside ¹⁰	\$	63,646.00
Corporate Board Expense	\$	4,793.00
Dues & Memberships ¹¹	\$	16,160.00
Employee Recruitment	\$	9,017.00
Equipment lease ¹²	\$	30,000.00
Fees - Other ¹³	\$	8,410.00
Financial Assistance ¹⁴	\$	214,441.00
Financial Assistance-Housing ¹⁵	\$	68,788.00
Food for employee meetings	\$	6,994.00
Furniture & Equipment ¹⁶	\$	71,897.00
Insurance Expense ¹⁷	\$	11,374.00
Janitorial Services	\$	43,500.00
Licenses & fees ¹⁸	\$	164,775.00
Mobile Communications: Cell & Laptop	\$	38,651.00
Printing & Copying - In-house ¹⁹	\$	9,260.00
Postage & Shipping	\$	29,394.00
Program/Professional Services ²⁰	\$	357,280.00
Property Taxes ²¹	\$	22,000.00
Public Relations ²²	\$	35,651.00
Rent ²³	\$	22,012.00
Security & Safety ²⁴	\$	40,500.00
Special Events-Development ²⁵	\$	85,534.00
Special Program Events ²⁶	\$	8,341.00
Subscriptions & Publications	\$	1,010.00
Supplies - Kitchen/Sanitation ²⁷	\$	12,250.00
Supplies - Office & Program ²⁸	\$	41,486.00

Telephone and Internet ²⁹	\$	136,151.00
Training - Staff	\$	37,823.00
Travel -Mileage ³⁰	\$	71,625.50
Volunteer Stipends	\$	2,500.00
Employee Equity Investment ³¹	\$	45,120.00
TOTAL	\$	6,609,732.70

<i>Net income or loss</i>	\$	264.82
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¹ Includes all individual contributions both unsolicited and in response to solicitations (annual appeal, etc.) except special events

² Annual Transforming Lives Luncheon and annual Golf Classic

³ Fees for low-cost Legal Services and select Mental Health services; rent collected from tenant at our West County facility

⁴ Rolled-over receivables from prior year contracts

⁵ Projected cash payments on pledges from prior years

⁶ Comprised of healthcare, vision, dental, life insurance, retirement, and statutory payroll taxes

⁷ Gift cards, stipends

⁸ Conference costs including travel

⁹ Costs are allocated to departments based on usage

¹⁰ Professional brochures and program materials, including translation

¹¹ Membership fees for professional societies including Catholic Charities network

¹² Including copier machines

¹³ Administrative and merchant card fees on donations

¹⁴ Includes direct cash assistance distributed to qualifying clients in crisis programs, legal program, and via our holiday program

¹⁵ Includes rental and utility bill assistance for qualifying clients in our Housing program

¹⁶ New purchases and equipment upgrades including IT upgrades

¹⁷ Includes general liability, contract-specific, and malpractice insurance

¹⁸ Software licenses, including Salesforce and Raiser's Edge, and miscellaneous fees

¹⁹ Cost of materials for employees with private printers (not allocated)

²⁰ Includes all 1099 independent contractors and professional services vendors

²¹ Taxes on Oakland and Richmond service centers

²² Press conferences, video production costs

- 23 Rent at Concord office and portables at Verde Elementary School
- 24 Contract with Bay Alarm, locking systems, safety drills and equipment
- 25 Fundraising and donor appreciation events
- 26 Client and staff recognition events
- 27 Kitchen and sanitation supplies at our three service centers
- 28 Includes program curricula, art supplies, crisis kits, general office supplies
- 29 Total telephone costs; allocated proportionately by location and FTE
- 30 Local travel between service centers and to meetings
- 31 One-time cost to reduce the substantial burden associated with dependent care on our current healthcare plan

Catholic Charities of the East Bay
FY15-16 Budget
Consolidated Summary
In US \$,000

Revenue	Budget 2015-2016
Government	\$ 2,063
Grants	1,245
Appeals	1,920
Contributions	50
Events	102
Client Fees/fiscal Agent/Program	677
Misc.	128
Interest	150
Total Revenue	\$ 6,335
Expense	
Staffing Expense	4,813
Professional Services	304
Program	434
Occupancy	378
Operating	503
Events	76
Depreciation	286
Total Expense Budget	6,794
Net Surplus(Loss) GAAP	
Net Surplus (Loss) Budget	\$ (459)

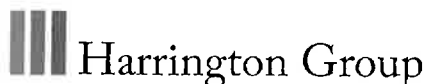
CATHOLIC CHARITIES OF THE EAST BAY

**FINANCIAL STATEMENTS,
SUPPLEMENTAL SCHEDULES,
and
ADDITIONAL INFORMATION**

APRIL 30, 2016

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Certified Public Accountants, LLP

INDEPENDENT AUDITORS' REPORT

To the Board of Directors
Catholic Charities of the East Bay

Report on the Financial Statements

We have audited the accompanying financial statements of Catholic Charities of the East Bay (a nonprofit organization), which comprise the Statement of Financial Position as of April 30, 2016, and the related Statements of Activities, Functional Expenses, and Cash Flows for the year then ended and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Catholic Charities of the East Bay as of April 30, 2016, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

INDEPENDENT AUDITORS' REPORT

continued

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the financial statements of Catholic Charities of the East Bay as a whole. The accompanying Schedule of Expenditures of Federal and Non-federal Awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance), is presented for purposes of additional analysis and is not a required part of the financial statements. The accompanying Schedule of Activities for Contracts with Alameda County is also presented for additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Summarized Comparative Information

We have previously audited Catholic Charities of the East Bay's 2015 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated September 25, 2015. In our opinion the summarized comparative information presented herein as of and for the year ended April 30, 2015, is consistent, in all material respects, with the audited financial statements from which it has been derived.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated September 30, 2016, on our consideration of Catholic Charities of the East Bay's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Catholic Charities of the East Bay's internal control over financial reporting and compliance.

Harrington Group

San Francisco, California
September 30, 2016

CATHOLIC CHARITIES OF THE EAST BAY

STATEMENT OF FINANCIAL POSITION

April 30, 2016

With comparative totals at April 30, 2015

	Unrestricted	Temporarily Restricted	2016	2015
ASSETS				
CURRENT ASSETS				
Cash and cash equivalents (Note 2)	\$ 390,975	\$ 283,200	\$ 674,175	\$ 269,371
Cash and cash equivalents held for other organizations (Note 6)	1,104,223		1,104,223	813,300
Total cash and cash equivalents	1,495,198	283,200	1,778,398	1,082,671
Accounts receivable	443,675		443,675	577,811
Pledges receivable (Note 2)	482,876	902,300	1,385,176	1,105,156
Prepaid expenses	23,520		23,520	106,495
Total current assets	2,445,269	1,185,500	3,630,769	2,872,133
Investments (Note 4)	3,562,458	1,526,533	5,088,991	5,247,005
Receivable from charitable trusts (Note 3)		121,721	121,721	124,340
Property and equipment (Note 5)	2,283,875		2,283,875	2,516,118
TOTAL ASSETS	\$ 8,291,602	\$ 2,833,754	\$ 11,125,356	\$ 10,759,596
LIABILITIES AND NET ASSETS				
LIABILITIES				
Accounts payable and accrued expenses	\$ 362,045	\$ -	\$ 362,045	\$ 160,262
Accrued vacation	187,253		187,253	157,803
Funds held for other organizations (Note 6)	1,104,223		1,104,223	813,300
Funds held in trust for East Bay Refugee Forum			-	38,128
Advances on contracts	59,929		59,929	42,308
Current portion - note payable (Note 7)	34,655		34,655	33,110
Total current liabilities	1,748,105	-	1,748,105	1,244,911
Note payable (Note 7)	1,282,201		1,282,201	1,316,654
TOTAL LIABILITIES	3,030,306	-	3,030,306	2,561,565
NET ASSETS				
Unrestricted				
Operating	2,977,421		2,977,421	2,962,624
Net investment in property	2,283,875		2,283,875	2,516,118
Temporarily restricted (Note 2)		2,833,754	2,833,754	2,719,289
TOTAL NET ASSETS	5,261,296	2,833,754	8,095,050	8,198,031
TOTAL LIABILITIES AND NET ASSETS	\$ 8,291,602	\$ 2,833,754	\$ 11,125,356	\$ 10,759,596

The accompanying notes are an integral part of these financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

STATEMENT OF ACTIVITIES

For the year ended April 30, 2016

With comparative totals for the year ended April 30, 2015

	Unrestricted	Temporarily Restricted	2016	2015
REVENUE AND SUPPORT				
SUPPORT				
Contributions	\$ 1,747,991	\$ 152,352	\$ 1,900,343	\$ 2,558,476
Grants from foundations and other organizations	417,500	617,287	1,034,787	1,039,154
Bequests (Note 2)	420,344	147,897	568,241	340,640
In-kind services (Note 2)	198,885		198,885	198,049
Special events	103,730		103,730	129,662
Grants from United Way		30,000	30,000	10,000
Donated items	8,700		8,700	-
Change in value of split-interest agreement (Note 3)		(2,619)	(2,619)	2,990
Total support	<u>2,897,150</u>	<u>944,917</u>	<u>3,842,067</u>	<u>4,278,971</u>
REVENUE				
Government contracts	2,234,649		2,234,649	2,394,105
Program fees	617,799		617,799	661,869
Miscellaneous income	139,842		139,842	138,352
TOTAL REVENUE	<u>2,992,290</u>	<u>-</u>	<u>2,992,290</u>	<u>3,194,326</u>
Net assets released from purpose restrictions	<u>830,452</u>	<u>(830,452)</u>	<u>-</u>	<u>-</u>
TOTAL REVENUE AND SUPPORT	<u>6,719,892</u>	<u>114,465</u>	<u>6,834,357</u>	<u>7,473,297</u>
EXPENSES				
Program services	4,491,722		4,491,722	4,950,289
General and administration	1,405,379		1,405,379	1,205,579
Fundraising	973,486		973,486	731,975
TOTAL EXPENSES	<u>6,870,587</u>	<u>-</u>	<u>6,870,587</u>	<u>6,887,843</u>
CHANGE IN NET ASSETS BEFORE NON-OPERATING REVENUE	(150,695)	114,465	(36,230)	585,454
NON-OPERATING REVENUE				
Interest and dividends	96,460		96,460	102,757
(Loss) on disposal of assets	(23,200)		(23,200)	-
(Loss) gain on investments	(140,011)		(140,011)	343,292
CHANGE IN NET ASSETS	(217,446)	114,465	(102,981)	1,031,503
NET ASSETS, BEGINNING OF YEAR	<u>5,478,742</u>	<u>2,719,289</u>	<u>8,198,031</u>	<u>7,166,528</u>
NET ASSETS, END OF YEAR	<u>\$ 5,261,296</u>	<u>\$ 2,833,754</u>	<u>\$ 8,095,050</u>	<u>\$ 8,198,031</u>

The accompanying notes are an integral part of these financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

STATEMENT OF FUNCTIONAL EXPENSES

For the year ended April 30, 2016

With comparative totals for the year ended April 30, 2015

	Program Services	General and Administration	Fundraising	Total Expenses	
				2016	2015
Salaries	\$ 2,380,645	\$ 841,550	\$ 508,181	\$ 3,730,376	\$ 3,416,163
Employee benefits	350,340	88,199	51,091	489,630	400,300
Payroll taxes	161,907	62,109	36,951	260,967	238,707
Total personnel costs	2,892,892	991,858	596,223	4,480,973	4,055,170
Financial assistance to individuals	421,720			421,720	683,503
Contract services	169,298	75,292	58,650	303,240	598,270
Occupancy expenses	237,335	20,630	32,666	290,631	291,307
Depreciation expense	179,067	61,395	36,905	277,367	288,963
Other	67,785	124,431	32,495	224,711	207,385
In-kind services	178,599	19,957	329	198,885	198,049
Telephone	129,196	45,610	6,795	181,601	123,797
Events	8,998	3,477	82,985	95,460	52,102
Travel expense	66,265	4,455	9,837	80,557	76,919
Printing and publications	5,661	5,071	62,813	73,545	78,250
Interest expense	40,090	13,745	8,262	62,097	60,537
Supplies	35,191	19,399	2,354	56,944	81,191
Training and conferences	23,726	3,271	25,805	52,802	32,459
Equipment leases	27,045	12,947	2,310	42,302	37,894
Postage and shipping	8,854	3,841	15,057	27,752	22,047
TOTAL 2016 FUNCTIONAL EXPENSES	\$ 4,491,722	\$ 1,405,379	\$ 973,486	\$ 6,870,587	
TOTAL 2015 FUNCTIONAL EXPENSES	\$ 4,950,289	\$ 1,205,579	\$ 731,975		\$ 6,887,843

The accompanying notes are an integral part of these financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

STATEMENT OF CASH FLOWS

For the year ended April 30, 2016

With comparative totals for the year ended April 30, 2015

	2016	2015
CASH FLOWS FROM OPERATING ACTIVITIES:		
Change in net assets	\$ (102,981)	\$ 1,031,503
Adjustments to reconcile change in net assets to net cash provided (used) by operating activities:		
Depreciation expenses	277,367	288,963
Loss on disposal of assets	23,200	=
Loss (gain) on investments	140,011	(343,292)
Reinvested interest	(95,961)	(102,345)
(Increase) decrease in operating assets:		
Accounts receivable	134,136	(279,911)
Pledges receivable	(280,020)	(1,041,216)
Prepaid expenses	82,975	(25,042)
Receivable from charitable trusts	2,619	(2,991)
Increase (decrease) in operating liabilities:		
Accounts payable	201,783	(311,812)
Accrued vacation	29,450	13,211
Funds held for other organizations	290,923	(532,307)
Funds held in trust for clients	(38,128)	(3,894)
Advances on contracts	17,621	(22,471)
NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES	682,995	(1,331,604)
CASH FLOWS FROM INVESTING ACTIVITIES:		
Purchase of new investments	(5,838,149)	(22,203)
Proceeds from sale of investments	5,952,113	145,269
Purchase of property and equipment	(68,324)	(157,324)
NET CASH PROVIDED (USED) BY INVESTING ACTIVITIES	45,640	(34,258)
Cash flows from financing activities:		
Principal payments on notes payable	(32,908)	(22,923)
NET CASH (USED) BY FINANCING ACTIVITIES	(32,908)	(22,923)
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	695,727	(1,388,785)
CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR	1,082,671	2,471,456
CASH AND CASH EQUIVALENTS, END OF YEAR	\$ 1,778,398	\$ 1,082,671
SUPPLEMENTAL DISCLOSURE:		
Operating activities reflect interest paid of:	\$ 62,097	\$ 60,537

The accompanying notes are an integral part of these financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

1. Organization

Catholic Charities of the Diocese of Oakland, Inc. dba Catholic Charities of the East Bay ("Catholic Charities") is a not-for-profit corporation, the Board members of which are elected subject to the approval of the Roman Catholic Bishop of the Diocese of Oakland.

What we do

Founded in 1935 by the Diocese of Oakland, Catholic Charities provides hope and healing to vulnerable children, youth and families in Alameda and Contra Costa Counties through compassionate services that transform lives and foster self-sufficiency. We work deeply to address the root causes of poverty and issues of social justice. We heed the call of Pope Francis to serve the vulnerable. We serve people in need regardless of religious belief, race, national origin, gender, or sexual orientation.

As the social service arm of the Diocese of Oakland, Catholic Charities is a national recognized leader in healing trauma and providing evidence-based mental health services and restorative practices.

Our Programs are organized under three service areas:

Welcoming the Stranger

Refugee Resettlement – welcoming refugees to our communities by meeting basic needs and assisting with new school systems, public institutions, housing, healthcare access, and culture.

Refugee Support Services – assisting refugees on the road to self-sufficiency through support services and access to English as a Second Language (ESL) classes and employment counseling services.

Legal Immigration Services – helping people navigate the complex immigration system to earn lawful working status and follow a path to citizenship. We offer low-cost legal services provided by Board of Immigration Appeals accredited representatives and licensed immigration attorneys.

Unaccompanied Minors – helping children and their families fleeing violence in Central America through direct legal representation and family reunification services. (Central American Minors (CAM) Refugee/Parole Program).

Healing Trauma

Experience Hope – supporting healing and building relationships to improve educational outcomes and strengthen communities. Programs include school-based behavioral health services for children and youth as well as training and coaching activities for school communities and service providers.

Crisis Response – providing intensive grief counseling and family support services to victims of violent crime, including family and friends of homicide victims in Oakland and Alameda County.

Path Two – home-based case management and clinical services to strengthen Contra Costa County families and keep children and young people safely in their homes.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

1. **Organization, continued**

Project AWARE – training adults in West Contra Costa County to recognize and respond to signs and symptoms of mental health challenges in teens and to decrease stigma around mental illness

Fostering Self-Sufficiency

Critical Family Needs – rental and utilities assistance to families about to lose their homes.

Family Literacy – adult, parent and child literacy classes to promote life-long learning and improve language skills. Serving school families in North Richmond and surrounding communities.

Family to Family – parish-based program helping families move from poverty to self-sufficiency; includes parish refugee co-sponsorship through the People Organized to Welcome Refugees (POWR) initiative.

Hands of Hope Information & Referral – connecting the community to Catholic Charities' programs and services, and facilitating referral to other community resources and service providers.

Coming Soon:

Claire's House – homes of love, hope and healing for commercially sexually exploited children in the Bay Area.

2. **Summary of Significant Accounting Policies**

A summary of the significant accounting policies applied in the preparation of the accompanying financial statements is as follows:

Basis of Presentation

The accompanying financial statements have been prepared on the accrual basis of accounting.

Accounting

In accordance with accounting principles of net asset accounting, Catholic Charities reports information regarding its financial position and activities according to the existence and nature of donor restrictions in three classes of net assets: unrestricted, temporarily restricted, and permanently restricted.

Accounting principles allow Catholic Charities to treat as unrestricted any restricted revenue where the restrictions are met in the same year. Catholic Charities has elected to follow that reporting method. As a result, all activities in which restrictions are met in the same year are recorded in the unrestricted net asset class.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

2. Summary of Significant Accounting Policies, continued

The following are descriptions of Catholic Charities' net asset classifications:

Unrestricted

Operating net assets: Operating net assets include unrestricted resources that are available for the general support of Catholic Charities' operations.

Board designated: Catholic Charities' Board of Directors has set aside unrestricted resources designated for stabilization of program operations and optimal utilization of Catholic Charities' unrestricted net assets towards achieving its mission and strategic objectives.

Net investment in property and equipment: Net resources invested in land, buildings, improvements, equipment, furniture, and software.

Temporarily Restricted. Temporarily restricted net assets result from contributions subject to donors' restrictions that expire with the passage of time or by actions of Catholic Charities. When donor restrictions from prior years expire, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restriction.

Temporarily restricted net assets consist of the following:

Time restricted:	
Charitable remainder trusts	\$ 121,721
Time and purpose restricted:	
Cassidy assistance fund for seniors	98,053
Purpose restricted:	
Care for the Elderly	1,471,227
General program support	890,214
CSEC	102,880
Youth: Restorative Justice and Violence	71,450
Immigration and Refugee Resettlement	32,508
Financial assistance	27,334
Family Literacy Program	17,469
Housing counseling	898
	<u>\$2,833,754</u>

For the year ended April 30, 2016, net assets released from restrictions were \$830,452 which were released from purpose restrictions.

Permanently Restricted. Permanently restricted net assets represent contributions to be held in perpetuity as directed by the donors. Catholic Charities had no permanently restricted net assets as of April 30, 2016.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

2. Summary of Significant Accounting Policies, continued

Cash and Cash Equivalents

For the purposes of the financial statements, Catholic Charities considers all undesignated cash and highly liquid investments with an original maturity of three months or less, and which are not held by investment managers as part of an investment portfolio, to be cash and cash equivalents.

Accounts Receivable

Accounts receivable are primarily from government agencies. No allowance for uncollectible amounts has been provided because they are deemed collectible.

Contributions and Pledges Receivable

Contributions received are reported as unrestricted, temporarily restricted or permanently restricted, depending upon donor restrictions, if any. Contributions, including unconditional promises to give, are recognized as revenues in the period the pledge is received. Conditional pledges to give are recognized when the conditions on which they depend are substantially met. Contributions that are promised in one year but are not expected to be collected until after the end of that year are discounted at an appropriate discount rate commensurate with the risks involved. Amortization of any such discounts is recorded as additional contribution revenue in accordance with donor-imposed restrictions, if any, on the contributions. Conditional promises to give are not included as support until the conditions are substantially met. All contributions receivable pledges are valued at the estimated fair present value at April 30, 2016 and are deemed fully collectible. Accordingly, no allowance for uncollectible pledges has been recorded as of April 30, 2016. A discount rate of 0.5% has been used to calculate the present value of pledges receivable. Total amount of pledges receivable at April 30, 2016 of \$1,385,176 is expected to be collected as follows:

<u>Year ended April 30,</u>	
2017	\$ 340,199
2018	309,637
2019	305,886
2020	297,320
2021	140,575
Thereafter	<u>3,645</u>
	1,397,262
Less: unamortized discount on contributions receivable	<u>(12,086)</u>
	<u>\$1,385,176</u>

Investments

Investments in marketable securities with readily determinable fair values and all investments in debt securities are stated at their fair values in the Statement of Financial Position. Unrealized gains and losses are included in the change in net assets in the Statement of Activities.

continued

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

2. Summary of Significant Accounting Policies, continued

Investment income and realized and unrealized gains (losses) on investments are reported as follows:

- As increases (decreases) in permanently restricted net assets, if the terms of the donor stipulations require that they be added to (deducted from) the principal of a permanent endowment fund.
- As increases (decreases) in temporarily restricted net assets, if the terms of the donor stipulations impose restrictions on the use of income.
- As increases (decreases) in unrestricted net assets in all other cases.

Fair Value Measurements

Generally accepted accounting principles provide guidance on how fair value should be determined when financial statement elements are required to be measured at fair value. Valuation techniques are ranked in three levels depending on the degree of objectivity of the inputs used with each level:

Level 1 inputs - quoted prices in active markets for identical assets

Level 2 inputs - quoted prices in active or inactive markets for the same or similar assets

Level 3 inputs - estimates using the best information available when there is little or no market

Catholic Charities is required to measure receivable from charitable trust, investments, pledged contributions, contributed services, and land and facilities at fair value. The specific techniques used to measure fair value for each financial statements element are described in the notes below that relate to each element.

Property and Equipment

Property and equipment are recorded at cost, if purchased, or at fair market value when donated. Such donations are reported as unrestricted support unless the donor has restricted the donated asset to a specific purchase. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as restricted support. Unless a donor stipulates the length of time an asset must be maintained, Catholic Charities reports expirations of donor restrictions when the donated or acquired asset is placed in service. At that time, Catholic Charities reclassifies temporarily restricted net assets to unrestricted net assets.

Property and equipment which cost \$2,000 or more are depreciated on a straight-line basis over the estimated useful lives of the assets as follows:

Buildings and improvements	10 - 30 years
Furniture, fixtures, and equipment	3 - 7 years

continued

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

2. Summary of Significant Accounting Policies, continued

Advances on Contracts

Advances on contracts represent advances from funding agencies for future services to be provided, or disbursements of direct assistance to individuals, by Catholic Charities. Revenue is recognized on these contracts when the services are performed or the assistance has been disbursed.

Bequests

Bequests are recognized as income at the time an unassailable right to the gift has been established and the proceeds are measurable in amount. All contributions are considered to be available for unrestricted use unless their use is specifically restricted by the donor. The Board has designated that funds received by bequest shall not be used for current operations, but be transferred into the investment fund for long term use.

Donated Services and Materials

Donated services are presented in the financial statements at the fair value of the services received. Contributions of services are recognized if the services received create or enhance non-financial assets or require specialized skills that are provided by individuals possessing those skills and would typically need to be purchased if not provided by donation. The value of contributed services and materials for the year ended April 30, 2016 totaled \$198,885 and \$8,700 respectively.

Tax Exempt Status

Catholic Charities is a qualified organization exempt from Federal income and California franchise taxes under the provisions of Sections 501(c)(3) of the Internal Revenue Code and 23701(d) of the California Revenue and Taxation Code, respectively. Accordingly, no provision for income taxes has been included in the accompanying financial statements.

Generally accepted accounting principles provide accounting and disclosure guidance about positions taken by an organization in its tax returns that might be uncertain. Management has considered its tax positions and believes that all of the positions taken by Catholic Charities' in its federal and state exempt organization tax returns are more likely than not to be sustained upon examination. Catholic Charities' returns are subject to examination by federal and state taxing authorities, generally for three and four years, respectively, after they are filed.

Functional Allocation of Expenses

Expenses by function have been allocated among program and supporting services classifications on the basis of time records and on estimates made by Catholic Charities' management.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

2. Summary of Significant Accounting Policies, continued

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect reported amounts of assets and liabilities, and disclosure of contingent assets and liabilities, at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Significant estimates included in the accompanying financial statements include, but are not limited to, the valuation of split-interest agreements (charitable trusts receivable), the functional expense allocations and depreciation expense. Actual results could differ from those estimates.

Concentration of Credit Risks

Financial instruments which potentially subject Catholic Charities to concentrations of credit risk consist of cash and investment securities. Catholic Charities places its cash with creditworthy, high quality financial institutions. Periodically, such investments may be in excess of federally insured limits.

Catholic Charities also has investments in equity and debt securities and is therefore subject to concentrations of credit risk. Investments are managed by investment advisors who have been given instructions by the Board of Directors. Though the market value of investments is subject to fluctuations on a year to year basis, the board officers believe that the investment policy is prudent for the long term welfare of Catholic Charities.

Credit risk with respect to accounts and contributions receivable is limited due to the credit worthiness of the government agencies and individuals who comprise the grantor and donor bases.

Comparative Totals

The financial statements include certain prior-year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with Catholic Charities' financial statements for the year ended April 30, 2015, from which the summarized information was derived.

Reclassification

Certain amounts from the April 30, 2015 financial statements have been reclassified to conform to April 30, 2016 presentation.

Subsequent Events

Management has evaluated subsequent events through September 30, 2016, the date which the financial statements were available for issue. No events or transactions have occurred during this period that appear to require recognition or disclosure in the financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

3. Receivable from Charitable Trusts

Catholic Charities is the beneficiary of a charitable remainder trust that is managed by third party trustees. The charitable remainder trusts provide for the payment of distributions to the grantor or other designated beneficiaries over the trust's term. At the end of the trust's term, the remaining assets are available for use by Catholic Charities. In the year the trust was established, the portion of the trust that was attributable to the present value of the future benefits to be received by Catholic Charities was recorded in the Statement of Activities as a temporarily restricted contribution. Each subsequent year, the change in the value of the trust has been reported in the Statement of Activities as increases in temporarily restricted net assets. The change for year ended April 30, 2016 was \$(2,619).

The receivable of \$121,721 from charitable trusts is recorded at the present value of the fair market value of the trust's assets at fiscal year end. The present value is calculated using the estimated remaining life of the trust, which is determined by the beneficiaries' life expectancies. The trust uses an approximate discount rate of 8.04%, estimated investment returns of approximately 7.0%, and an estimated life expectancy.

4. Investments

Significant information about investments at April 30, 2016 is summarized as follows:

Equity funds	\$3,134,552
Fixed income	1,734,542
Money market funds	<u>219,897</u>
Total	<u>\$5,088,991</u>

The unrestricted portion of total investments in the amount of \$3,787,552 is designated by the Board of Directors for long term use. Another \$1,246,133 is to be used for elderly care, and \$55,306 is restricted by the donor to be used at the rate of \$70,000 per year for senior homelessness prevention.

5. Property and Equipment

Property and equipment at April 30, 2016 consist of the following:

Building and improvements	\$ 3,093,830
Furniture and equipment	<u>391,978</u>
	3,485,808
Less: accumulated depreciation	<u>(1,576,157)</u>
	1,909,651
Land	<u>374,224</u>
	<u>\$ 2,283,875</u>

Depreciation expense for the year ended April 30, 2016 was \$277,367.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

6. Funds Held on Behalf of Other Organizations

Catholic Charities collects money from Catholic parishes to benefit other Catholic charitable organizations. Catholic Charities also acts as a fiscal agent for disbursing the San Francisco Chronicle's Season of Sharing fund in Alameda and Contra Costa Counties. The Season of Sharing funds are used primarily for housing assistance to individuals. Alameda County Department of Social Services and Contra Costa County administer the program, which involves county social services agencies and other community organizations it designates to screen and direct disbursements to eligible individuals. Catholic Charities is one of the designated organizations.

The total amounts collected, received, remitted, and the remaining balance held, on behalf of the other organizations, were as follows:

Balance, April 30, 2015	\$ 813,300
Amount received from San Francisco Chronicle Season of Sharing Fund	2,359,998
Amounts collected for other organizations during the fiscal year:	
Catholic Campaign for Human Development	175,717
Catholic Relief Services – General Collection	148,986
Catholic Relief Services – Rice Bowl Collection	<u>263,376</u>
	3,761,377
Less amounts remitted during fiscal year	<u>(2,657,154)</u>
Balance, April 30, 2016	<u>\$1,104,223</u>

7. Note Payable

In December 2012, Catholic Charities entered into a 3 year loan agreement with a corporation for the purchase of a building in Richmond, California, with the payments being amortized over 20 years. The loan bears interest at 5% per annum, with monthly principal and interest payments of \$7,919, and was secured by a first deed of trust on the property and the entire balance with any interest is repayable on January 1, 2016.

Catholic Charities refinanced the mortgage loan on July 8, 2013 with a financing institution at a "Swapping Agreement All-in Rate" of 4.57%. Loan is secured by a first deed of trust on the property and the entire balance with any interest is repayable on September 1, 2020.

Note payable at April 30, 2016 consists of the following:

Richmond, California mortgage loan	\$1,316,856
Less: current portion	<u>(34,655)</u>
	<u>\$1,282,201</u>

continued

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

7. Note Payable, continued

Maturities for the note payable are as follows:

<u>Year ended April 30,</u>	
2017	\$ 34,655
2018	36,273
2019	37,966
2020	39,737
2021	<u>1,168,225</u>
	<u>\$1,316,856</u>

8. Lease Commitments

Catholic Charities leases properties, postage and copier equipment under short-term operating leases.

Total lease expense for the year ended April 30, 2016 was \$93,062.

9. Retirement Plan

On November 1, 2008, Catholic Charities adopted a 403(b) plan. Employees are eligible to participate. There is no minimum age or service requirements for employees to make salary reduction contributions to the plan. Eligibility for employer base and matching contributions are offered only to employees age 18 and older who have completed 1,000 hours of service within any 12-month period of employment with Catholic Charities or other members of the Catholic Charities USA network and the Roman Catholic Diocese of Oakland. The established base contribution rate is 3% of compensation. Contributions paid to the plan for the year ended April 30, 2016 amounted to \$36,230.

10. Risks and Uncertainties

Catholic Charities derives the majority of its revenues from government grants and external donors. Accordingly, the success of Catholic Charities depends to a large extent on continued funding from these donors and the philanthropic environment in general.

Catholic Charities' grants and contracts are subject to inspection and audit by the appropriate governmental funding agency. The purpose is to determine whether program funds were used in accordance with their respective guidelines and regulations. The potential exists for disallowance of previously-funded program costs. The ultimate liability, if any, which may result from these governmental audits cannot be reasonably estimated and, accordingly, Catholic Charities has no provisions for the possible disallowance of program costs on its financial statements.

CATHOLIC CHARITIES OF THE EAST BAY

NOTES TO FINANCIAL STATEMENTS

11. Fair Value Measurements

The table below presents the balances of assets or liabilities measured at fair value at April 30, 2016 on a recurring basis:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Fixed income				
US Treasury Notes	\$1,004,078	\$ -	\$ -	\$1,004,078
Other Government Securities	363,696			363,696
US Treasury Bonds	260,079			260,079
US Treasury Inflation Bonds	106,689			106,689
	<u>1,734,542</u>	<u>-</u>	<u>-</u>	<u>1,734,542</u>
Equities				
Domestic	<u>3,134,551</u>	<u>-</u>	<u>-</u>	<u>3,134,551</u>
Receivable from Charitable Trusts			<u>121,721</u>	<u>121,721</u>
	<u>\$4,869,093</u>	<u>\$ -</u>	<u>\$121,721</u>	<u>\$4,990,814</u>

The fair values of fixed income and equities have been measured on a recurring basis using quoted prices for identical assets in active markets (Level 1 inputs).

The fair value of the receivable from charitable trusts is measured on a recurring basis by calculating the change in value of the client's beneficial interest in the trust (Level 3 inputs).

The following table provides further details of the Level 3 fair value measurements:

Balance, beginning of year	\$124,340
Change in the charitable trusts value	<u>(2,619)</u>
Balance, end of year	<u>\$121,721</u>

The table below presents transactions measured at fair value on a non-recurring basis during the year ended April 30, 2016:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Pledged contributions (new)	\$ -	\$ -	\$580,820	\$580,820
Contributed services		198,885		198,885
Contributed materials		<u>8,700</u>		<u>8,700</u>
	<u>\$ -</u>	<u>\$207,585</u>	<u>\$580,820</u>	<u>\$788,405</u>

The fair value of contributed services and materials has been measured on a non-recurring basis using quoted prices for similar assets in inactive markets (Level 2 inputs).

The fair value of pledged contributions are measured on a non-recurring based on the value provided by the donor at the date of pledge (Level 3 inputs).

SUPPLEMENTAL SCHEDULES

CATHOLIC CHARITIES OF THE EAST BAY

SCHEDULE OF EXPENDITURES OF FEDERAL AND NON-FEDERAL AWARDS For the year ended April 30, 2016

Program Name	Contract Number	Federal CFDA No.	Contract Term	Program Award	Federal	Non-Federal	Program Expenditures from Government Revenues
Federal Award							
U.S. Department of Health and Human Services ("DHHS"):							
Directly from DHHS, Substance Abuse and Mental Health Services, Projects of Regional and National Significance							
- Now Is The Time (NITT)	1H79SA062800-01	93.243	09/30/15 - 09/29/16	\$ 124,998	\$ 60,073	\$ -	\$ 60,073
- Trauma-Informed Practices (TIPS)	5U79SA061185-03	93.243	09/30/14 - 09/29/15	501,036	176,874		176,874
- Trauma-Informed Practices (TIPS)	5U79SA061185-04	93.243	09/30/15 - 09/29/16	400,000	216,709		216,709
Sub-total Directly from DHHS				1,026,034	453,656		453,656
Pass-through, County of Alameda - Refugee and Entrant Assistance, Targeted Assistance Grants							
Pass-through, County of Alameda - Refugee and Entrant Assistance, Targeted Assistance Grants	SSGTAF013012014	93.584	10/01/14 - 09/30/15	92,725	18,415		18,415
Sub-total Pass-through, County of Alameda	SSGTAF015012015	93.584	10/01/15 - 09/30/16	286,976	70,611		70,611
Sub-total pass-through, County of Alameda				379,701	89,026		89,026
Pass-through, County of Alameda - Refugee and Entrant Assistance - State Administered Programs							
Pass-through, County of Alameda - Temporary Assistance for Needy Families (a)	SSGRESS14010000	93.566	07/01/15 - 09/30/16	609,091	328,573	33,715	362,288
Sub-total pass-through, County of Alameda - Employment/RESS Oakland	SSGRESS14010000	93.588	07/01/15 - 09/30/16	552,409	328,573		328,573
Total DHHS				1,161,500	657,146	33,715	690,861
				2,567,235	1,199,828	33,715	1,233,543
U.S. Department of Housing and Urban Development ("HUD"):							
Pass-through, Catholic Charities of USA - Housing Counseling Assistance Program							
Total HUD		14.169	07/01/15 - 06/30/16	13,680	5,070		5,070
				13,680	5,070		5,070
U.S. Department of State:							
Pass-through, United States Conference of Catholic Bishops - U.S. Refugee and Admissions Program							
Pass-through, United States Conference of Catholic Bishops - U.S. Refugee and Admissions Program		19.510	10/01/14 - 09/30/15	127,500	24,243		24,243
Pass-through, United States Conference of Catholic Bishops - U.S. Refugee and Admissions Program		19.510	10/01/15 - 09/30/16	135,000	48,690		48,690
Pass-through, United States Conference of Catholic Bishops - U.S. Refugee and Admissions Program		19.510	10/01/14 - 09/30/15	175,500	39,104		39,104
Pass-through, United States Conference of Catholic Bishops - U.S. Refugee and Admissions Program		19.510	10/01/15 - 09/30/16	135,000	125,089		125,089
Total United States Department of State, Bureau of Population, Refugees and Migration				573,000	237,126		237,126
Total Federal and Non-federal Awards				\$ 3,153,915	\$ 1,442,024	\$ 33,715	\$ 1,475,739

(a) Audited as a major program

Summary of Significant Accounting Policies:

1. Basis of Accounting - The Schedule of Expenditures of Federal and Non-federal Awards has been reported on the accrual basis of accounting.
2. Catholic Charities is exempt from income taxation under Internal Revenue Code Section 501(c)(3) and California Revenue Taxation Code Section 23701d.

See independent auditors' report.

CATHOLIC CHARITIES OF THE EAST BAY

SCHEDULE OF ACTIVITIES FOR CONTRACTS WITH ALAMEDA COUNTY For the year ended April 30, 2016

Contract 1 Number	15-1958	82879	85177	SSGTAF013012014	SSGRRRESS0100001	G408610	
Contract Period 1	10/1/15-6/30/16	7/1/14 - 12/31/15	7/1/14 - 6/30/15	10/1/14 - 9/30/15	07/01/14 - 05/31/16	11/21/14 - 11/20/15	
Contract Period 1 Amount	\$ 109,208	\$ 450,000	\$ 175,000	\$ 92,725	\$ 1,161,500	\$ 90,000	
Contract 2 Number		85926		SSGTAF015012015			
Contract Period 2	01/01/16 - 06/30/17			10/01/15 - 09/30/16			
Contract Period 2 Amount		\$ 450,000		\$ 286,976			
Contract/Program Description	Oakland USD Crisis Counseling	City of Oakland Measure Y - CRSN	Emergency Relocation	Targeted Assistance	Employment/RESS Alameda County	Centro Legal de la Raza	Total
Revenue							
Grants	\$ 85,442	\$ 311,521	\$ 29,167	\$ 89,026	\$ 690,861	\$ 48,348	\$ 1,254,365
Rent income							
Other: private grant							-
Total Revenues	85,442	311,521	29,167	89,026	690,861	48,348	1,254,365
Salaries	55,483	92,029	758	35,857	356,151	51,694	591,972
Employee benefits	6,339	5,918	6	6,983	63,739	9,058	92,043
Payroll taxes	4,129	5,084		2,589	21,723	3,772	37,297
Total personnel costs	65,951	103,031	764	45,429	441,613	64,524	721,312
Financial assistance to individuals							
Contracted Services	74	14,565	2,321	3,638	56,435		76,959
Occupancy expenses	4,027	122,573	11,613		212	1,346	135,818
Other	129	7,053	122	150	41,509	4,059	56,920
Telephone	1,091	3,337	30	70	3,168	694	7,428
Supplies	1,422	3,006	46	1,176	27,911	1,273	34,503
Travel expense	950	724		1,573	5,127		8,846
Printing and publications	143	5,150	1,609	728	7,818		16,255
Postage and shipping		1,386	9	185	3,623	865	6,211
Training and conference	4,491	120		218	177	25	540
Indirect cost	9,080	940			3,640		9,071
Total direct costs	\$ 87,358	\$ 291,885	\$ 25,413	\$ 53,167	\$ 696,853	\$ 72,786	\$ 1,227,462

ADDITIONAL INFORMATION



Certified Public Accountants, LLP

**Independent Auditors' Report on Internal Control Over Financial Reporting
and on Compliance and Other Matters Based on an Audit of Financial Statements
Performed in Accordance With *Government Auditing Standards***

To the Board of Directors
Catholic Charities of the East Bay

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Catholic Charities of the East Bay, which comprise the Statement of Financial Position as of April 30, 2016, and the related Statements of Activities, Functional Expenses, and Cash Flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 30, 2016.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered Catholic Charities of the East Bay's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Catholic Charities of the East Bay's internal control. Accordingly, we do not express an opinion on the effectiveness of Catholic Charities of the East Bay's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Catholic Charities of the East Bay's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

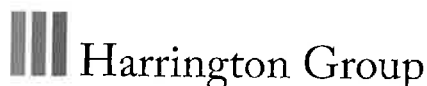
**Independent Auditors' Report on Internal Control Over Financial Reporting
and on Compliance and Other Matters Based on an Audit of Financial Statements
Performed in Accordance With *Government Auditing Standards***
continued

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Harrington Group

San Francisco, California
September 30, 2016



Certified Public Accountants, LLP

Independent Auditors' Report on Compliance for Each Major Program and on Internal Control Over Compliance Required by the Uniform Guidance

To the Board of Directors
Catholic Charities of the East Bay

Report on Compliance for Each Major Federal Program

We have audited Catholic Charities of the East Bay's compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Catholic Charities of the East Bay's major federal programs for the year ended April 30, 2016. Catholic Charities of the East Bay's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with the federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Catholic Charities of the East Bay's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Catholic Charities of the East Bay's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Catholic Charities of the East Bay's compliance.

Opinion on Each Major Federal Program

In our opinion, Catholic Charities of the East Bay complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended April 30, 2016.

**Independent Auditors' Report on Compliance for Each Major Program
and on Internal Control Over Compliance Required by the Uniform Guidance**
continued

Report on Internal Control over Compliance

Management of Catholic Charities of the East Bay is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Catholic Charities of the East Bay's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Catholic Charities of the East Bay's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Harrington Group

San Francisco, California
September 30, 2016

CATHOLIC CHARITIES OF THE EAST BAY
Schedule of Findings and Questioned Costs
For the year ended April 30, 2016

Section I – Summary of Auditors’ Results

Financial Statements:

Type of auditors’ report issued: Unmodified

Internal control over financial reporting:

Material weakness(es) identified? No

Significant deficiencies identified? None reported

Noncompliance material to financial statements noted? No

Federal Awards:

Internal control over major programs:

Material weakness(es) identified? No

Significant deficiencies identified? None reported

Type of auditors’ report issued on compliance for major programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with section 200.516 Audit Findings of the Uniform Guidance? No

Dollar threshold used to distinguish between Type A and Type B programs: \$750,000

Auditee qualified as low-risk auditee? Yes

Identification of Major Programs:

U.S. Department of Health and Human Services:

Temporary Assistance for Needy Families 93.558

Section II – Financial Statements Findings

There are no findings required to be reported in accordance with *Generally Accepted Government Auditing Standards*.

Section III – Federal Award Findings and Questioned Costs

There are neither findings nor questioned costs for Federal awards as defined in the Uniform Guidance.

Section IV – Summary Schedule of Prior Year Findings

None.