

Googling Your Grantee: Due Diligence and the Web

Grants Managers Network
2004 Annual Conference
Toronto, Canada



Joe Behaylo – Open Society Institute, New York, NY

Janice Opalski and Liisa Rand – Robert Wood Johnson Foundation,
Princeton, NJ

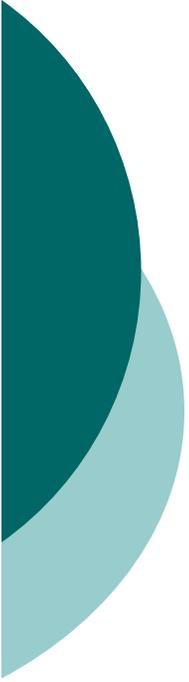
Marty Schneiderman - Information Age Associates and
Foundation News & Commentary, Princeton, NJ

Diane Ford – Sobrato Family Foundation, Cupertino, CA



Session Agenda

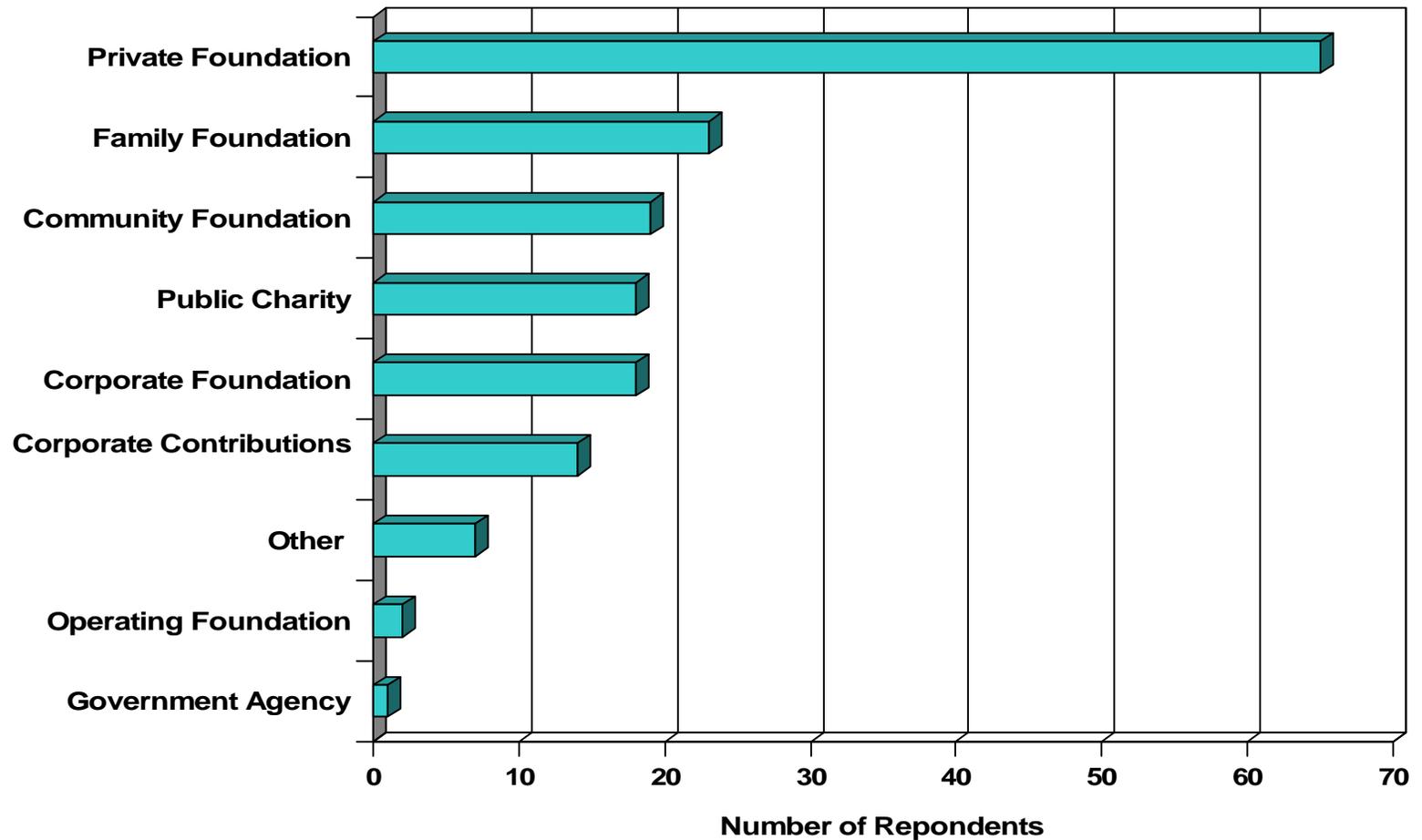
1. Introduction
2. Googling Your Grantee: Due Diligence Survey Results
3. Overview of Online Research Tools
4. Robert Wood Johnson Foundation - Case Study
5. Sobrato Family Foundation - Case Study
6. Open Discussion



Googling Your Grantee: Due Diligence Survey

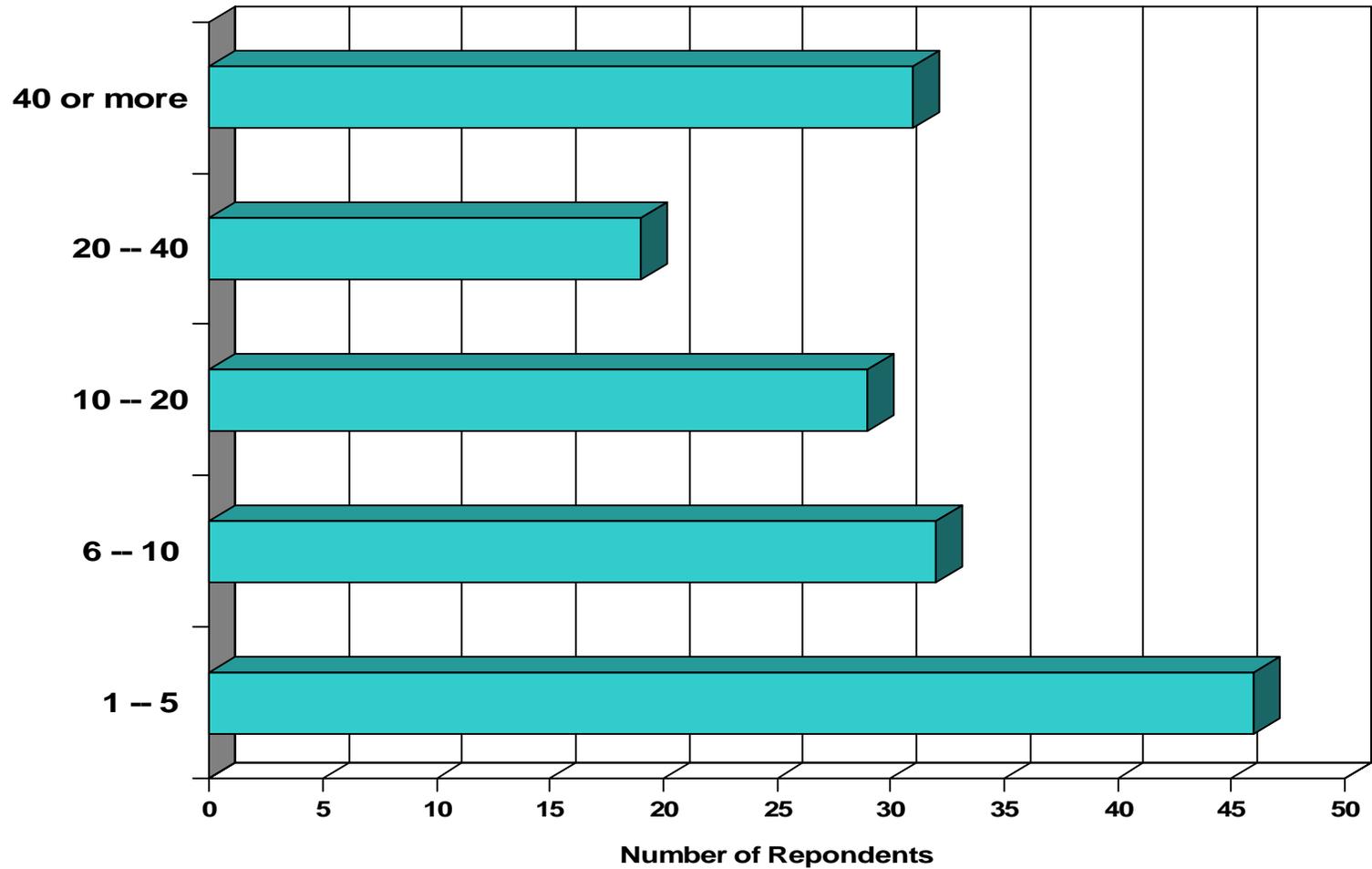
- i Survey conducted online in February and March 2004
- i 157 total respondents
- i Cross section of philanthropic institutions by type, size, and number of grants
- i Complete survey results are available at www.gmnetwork.org

Type of Grantmaking Organization



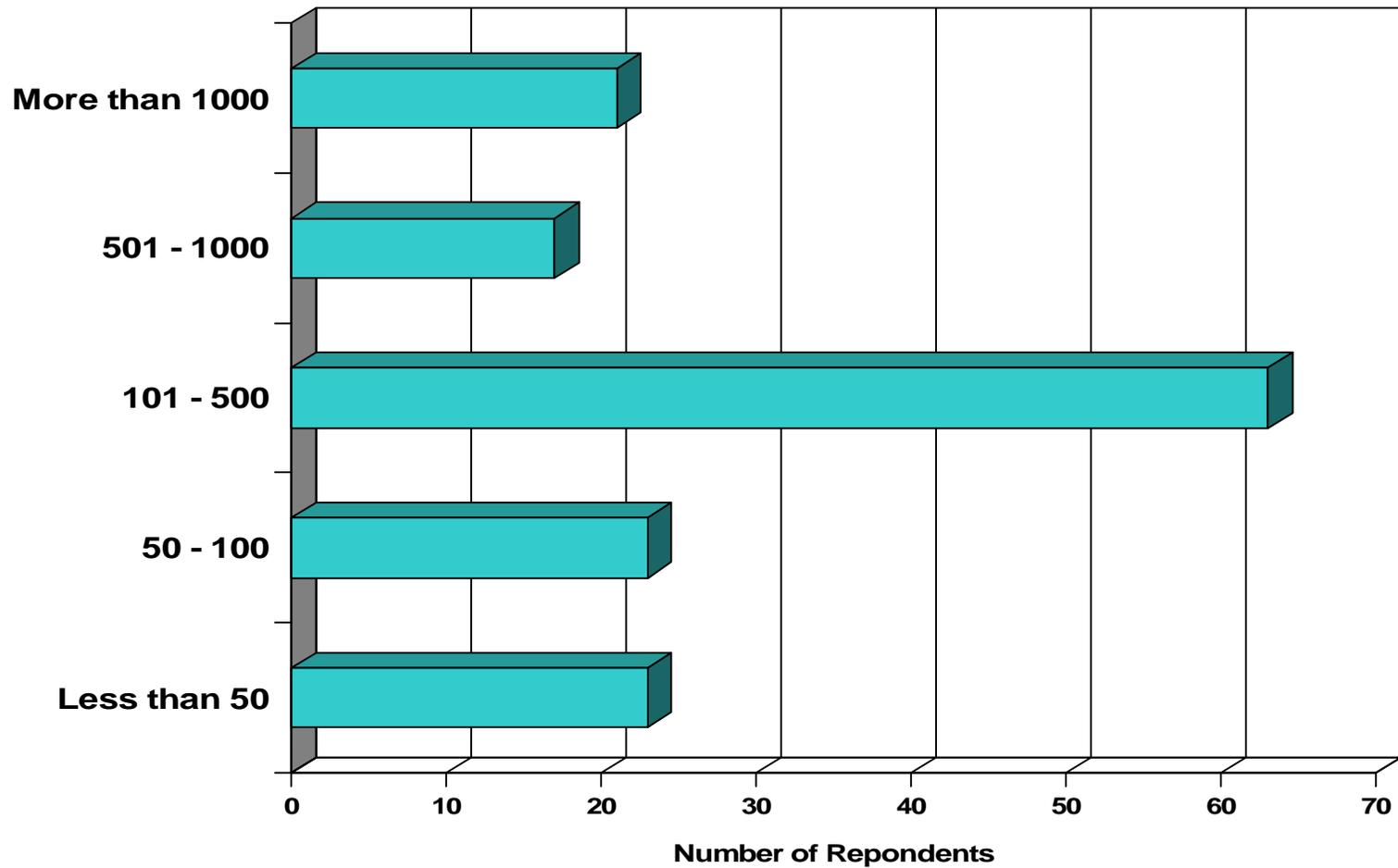
Source: GMN Online Survey March 2004

What is the total staff size of your organization?



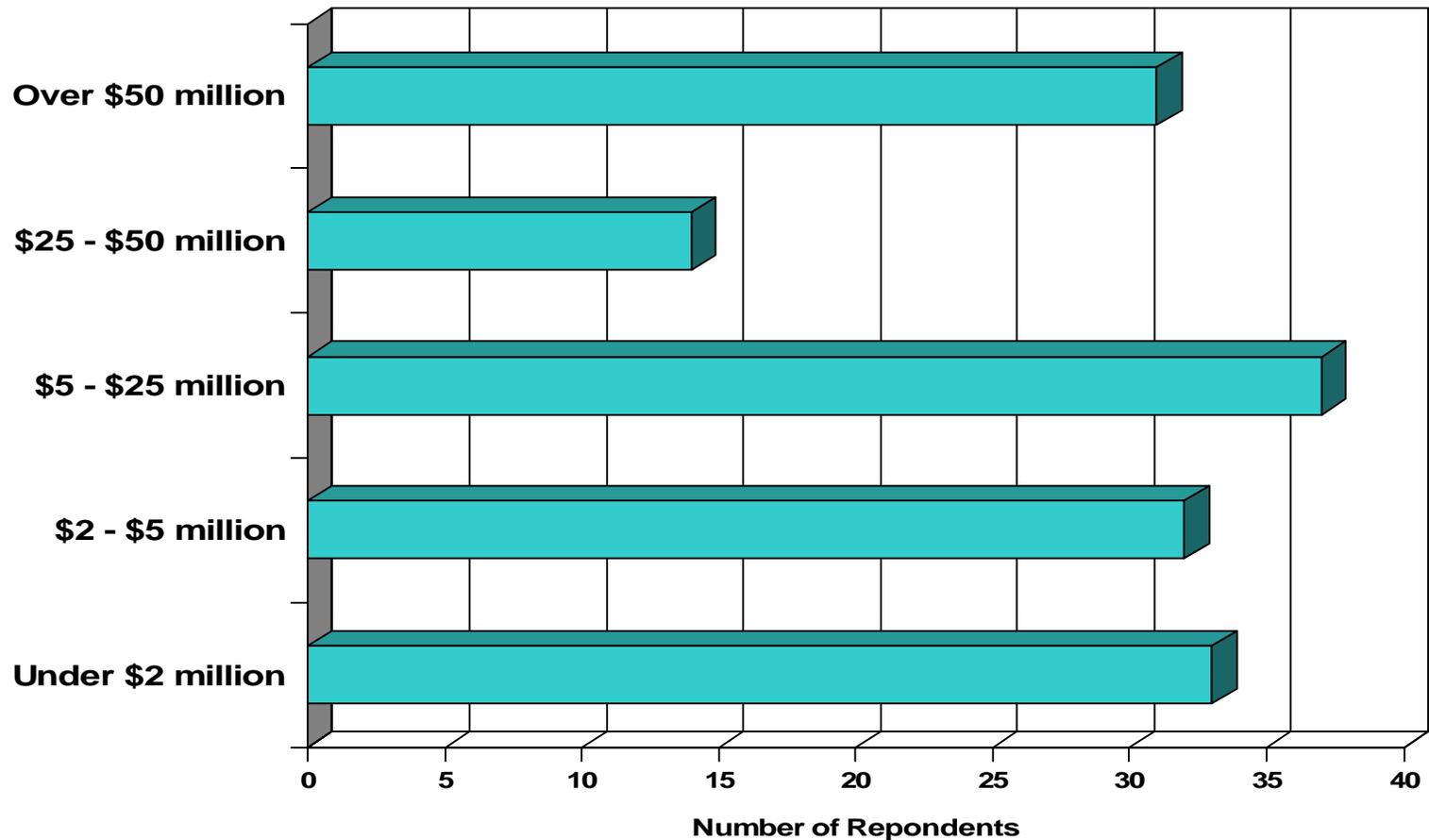
Source: GMN Online Survey March 2004

How many grants did your organization fund in FY 2003?



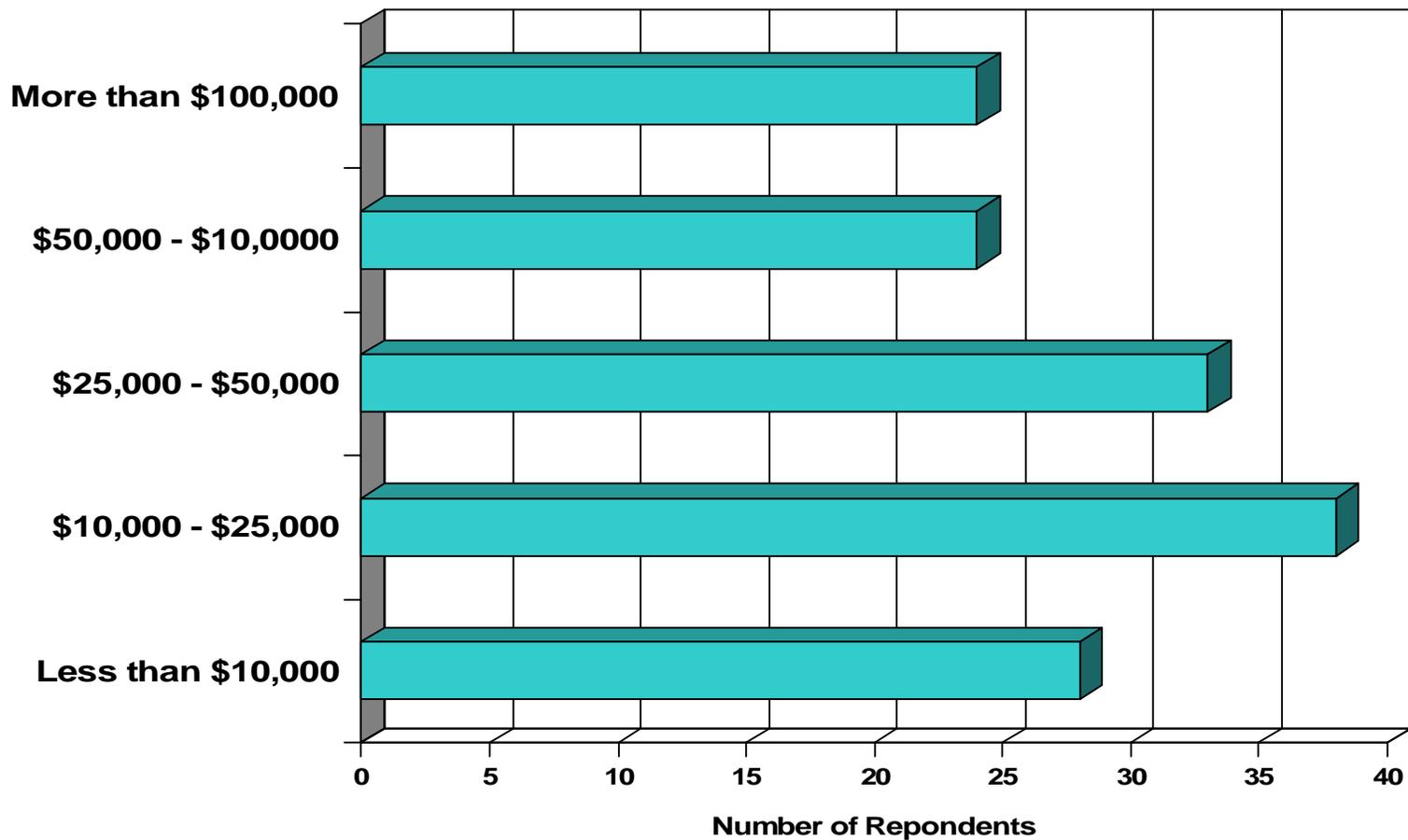
Source: GMN Online Survey March 2004

What is the total value of grants your organization made in FY 2003?



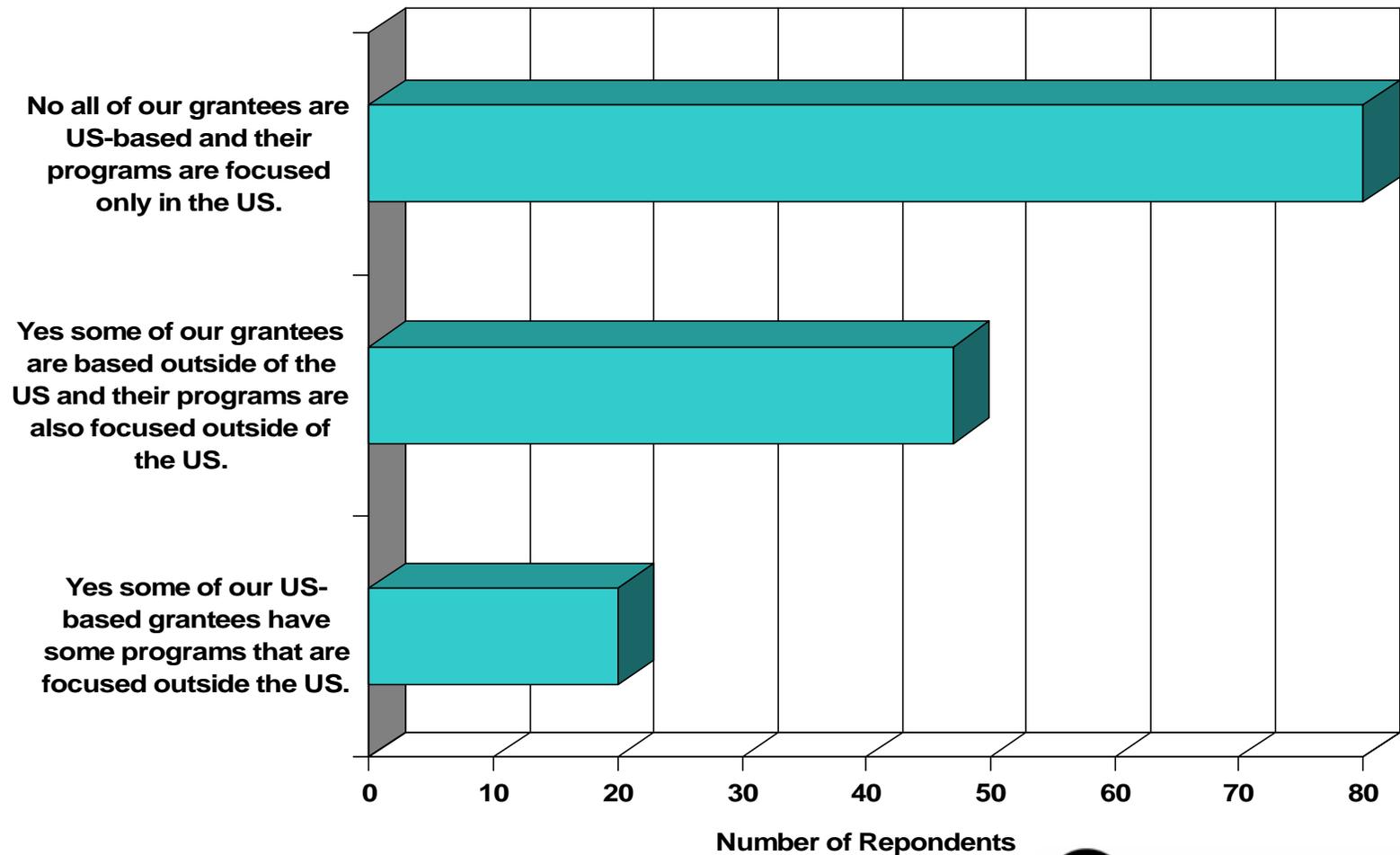
Source: GMN Online Survey March 2004

What was the average grant amount in FY 2003?



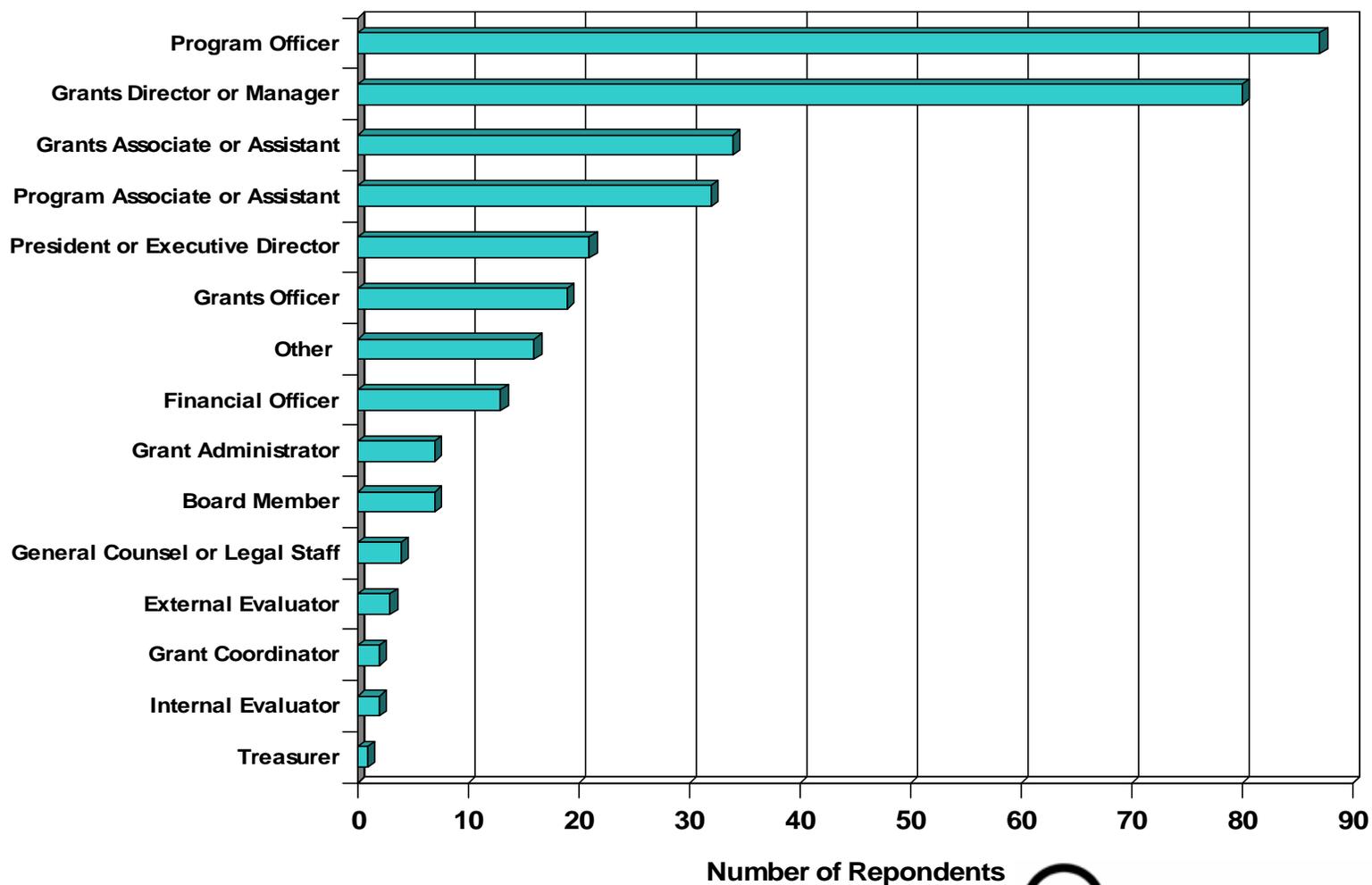
Source: GMN Online Survey March 2004

Do you make grants to nonprofits that support work outside the USA?



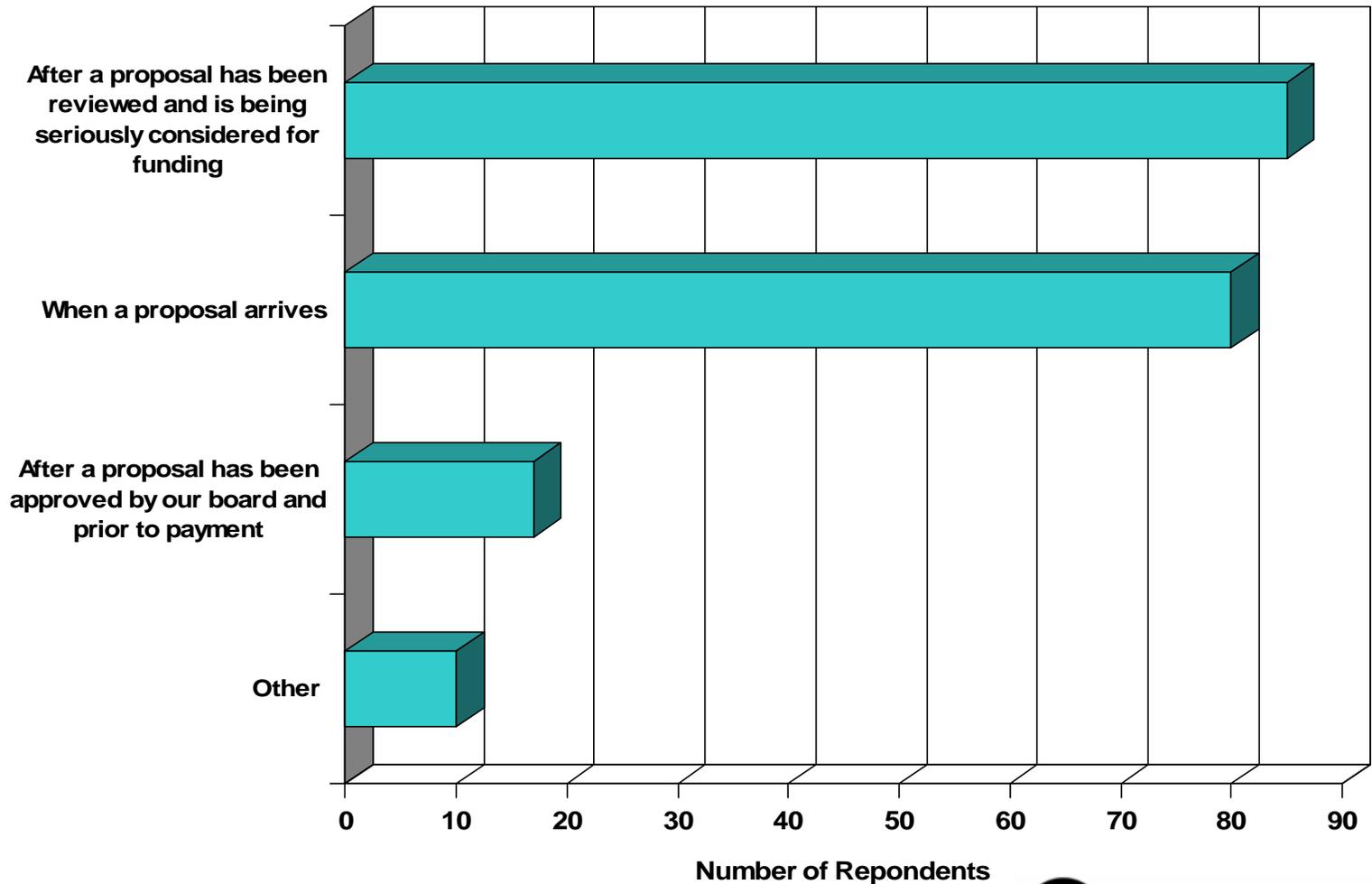
Source: GMN Online Survey March 2004

Which staff are responsible for conducting due diligence reviews?



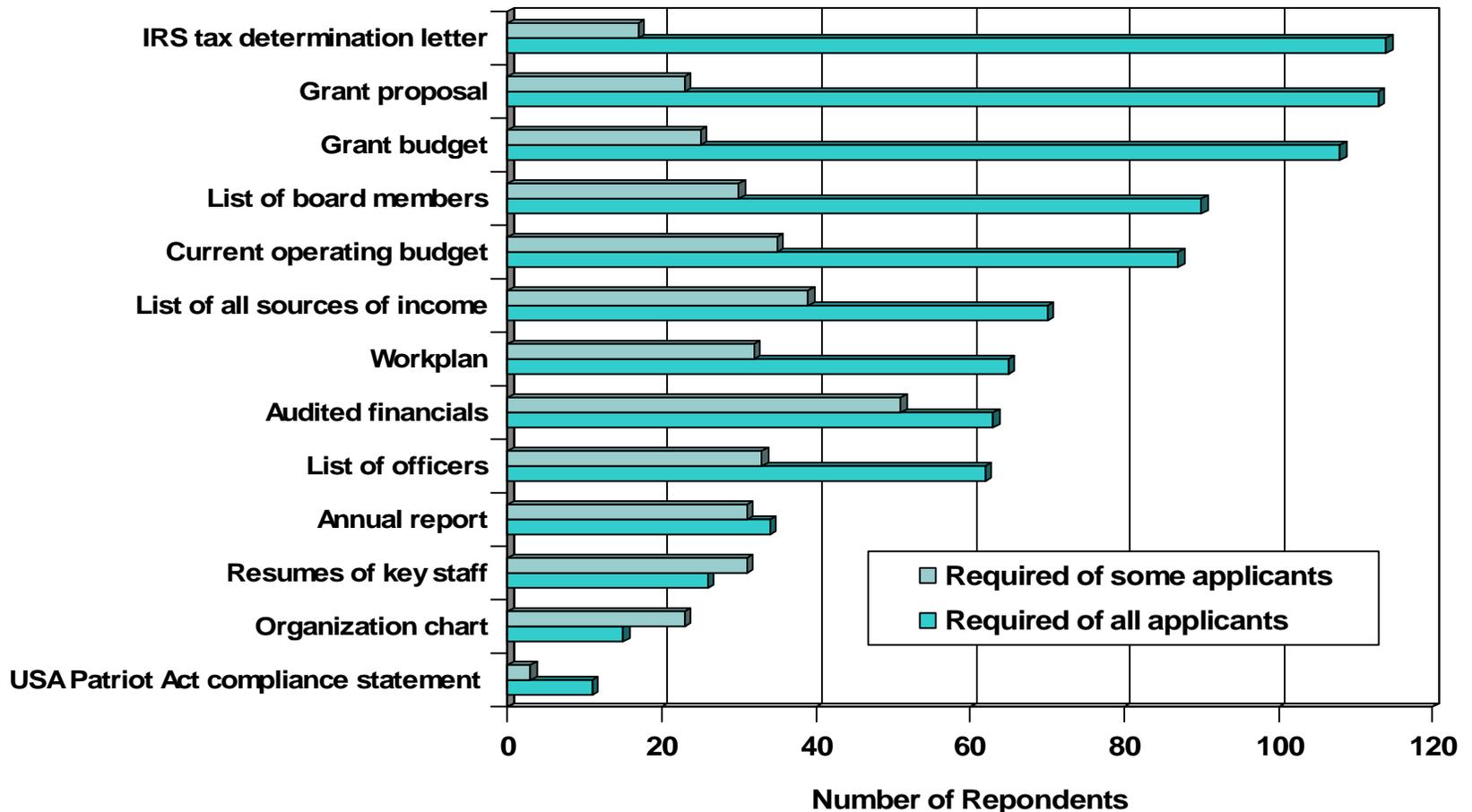
Source: GMN Online Survey March 2004

When are due diligence reviews conducted?



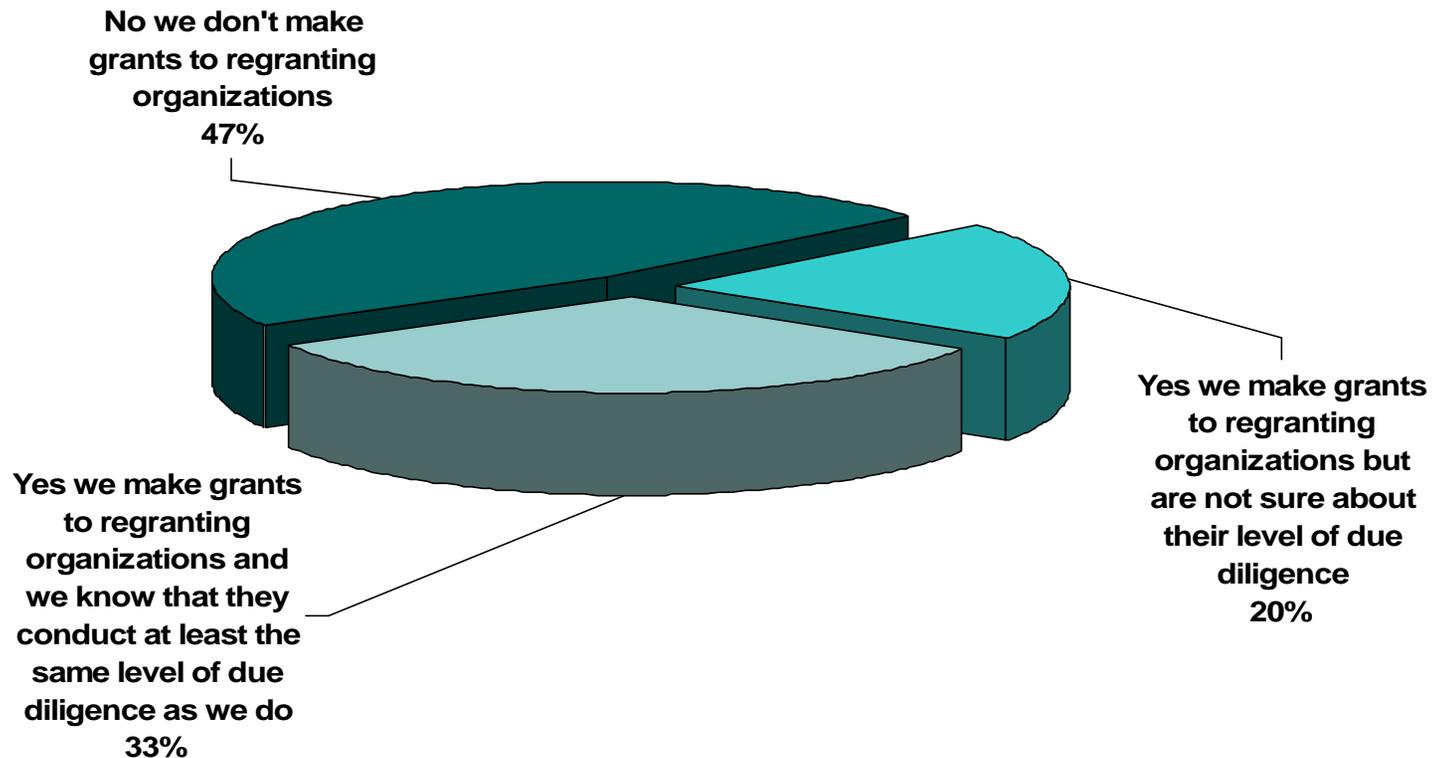
Source: GMN Online Survey March 2004

Which documents are required as part of your pre-award due diligence?



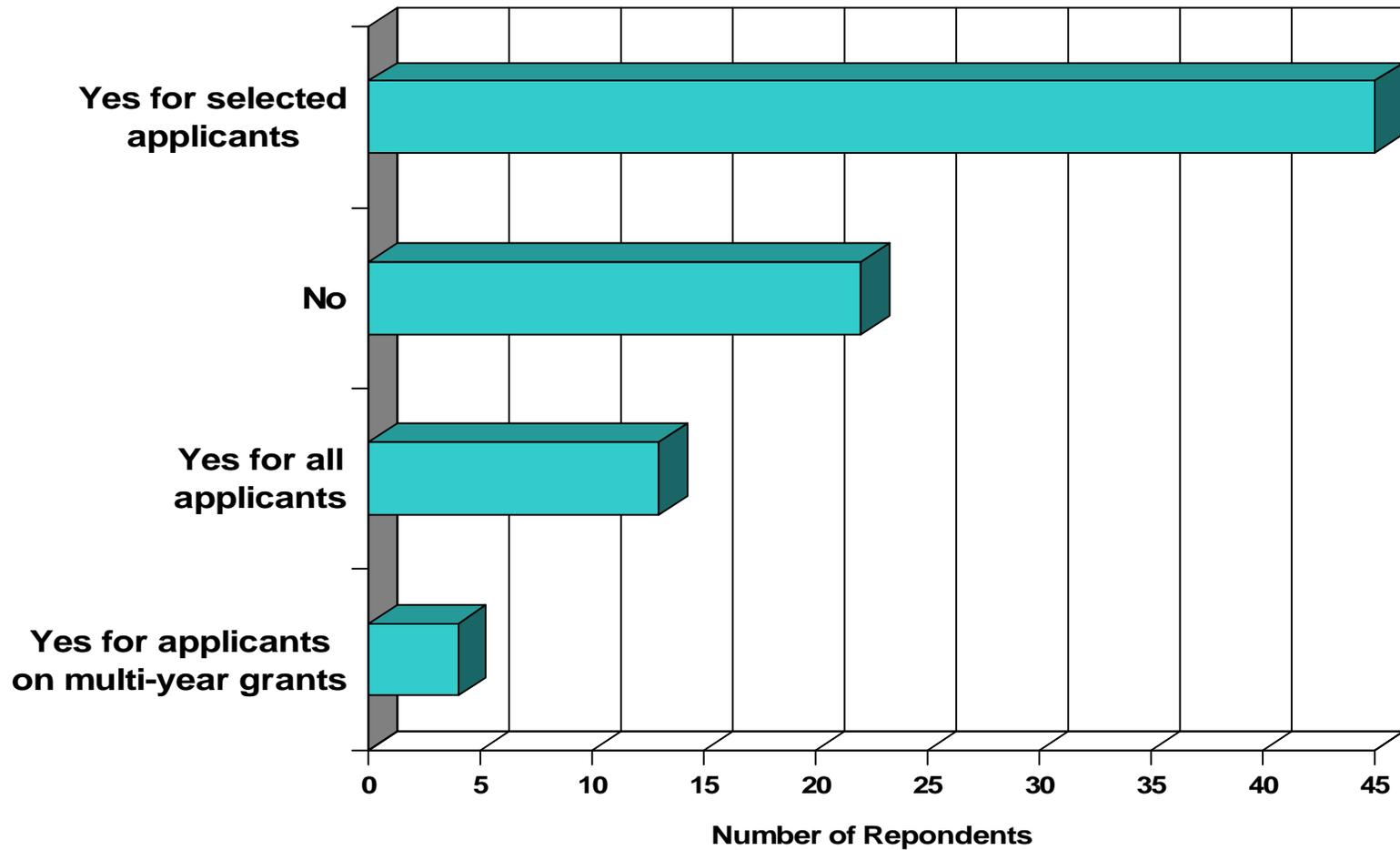
Source: GMN Online Survey March 2004

Regranting Organizations and their Level of Due Diligence



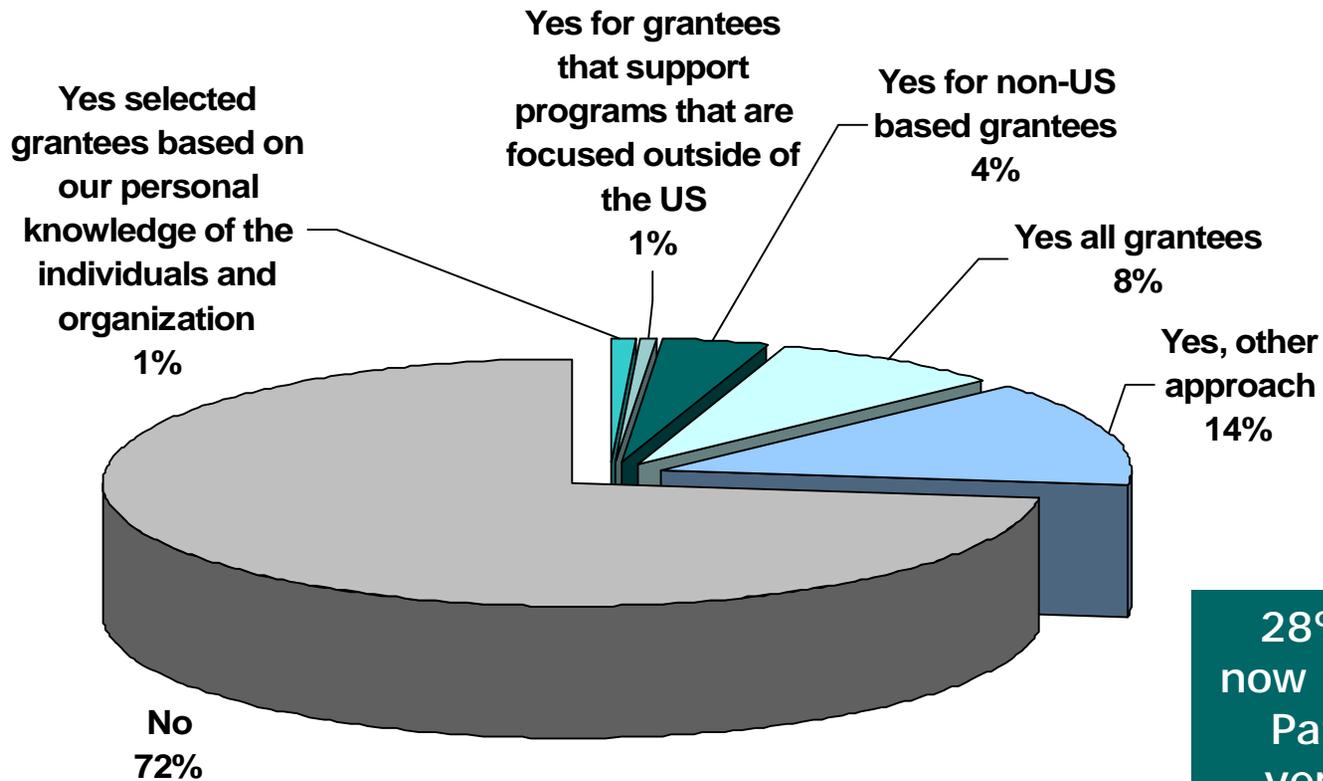
Source: GMN Online Survey March 2004 – 138 question respondents

Do you conduct site visits?



Source: GMN Online Survey March 2004

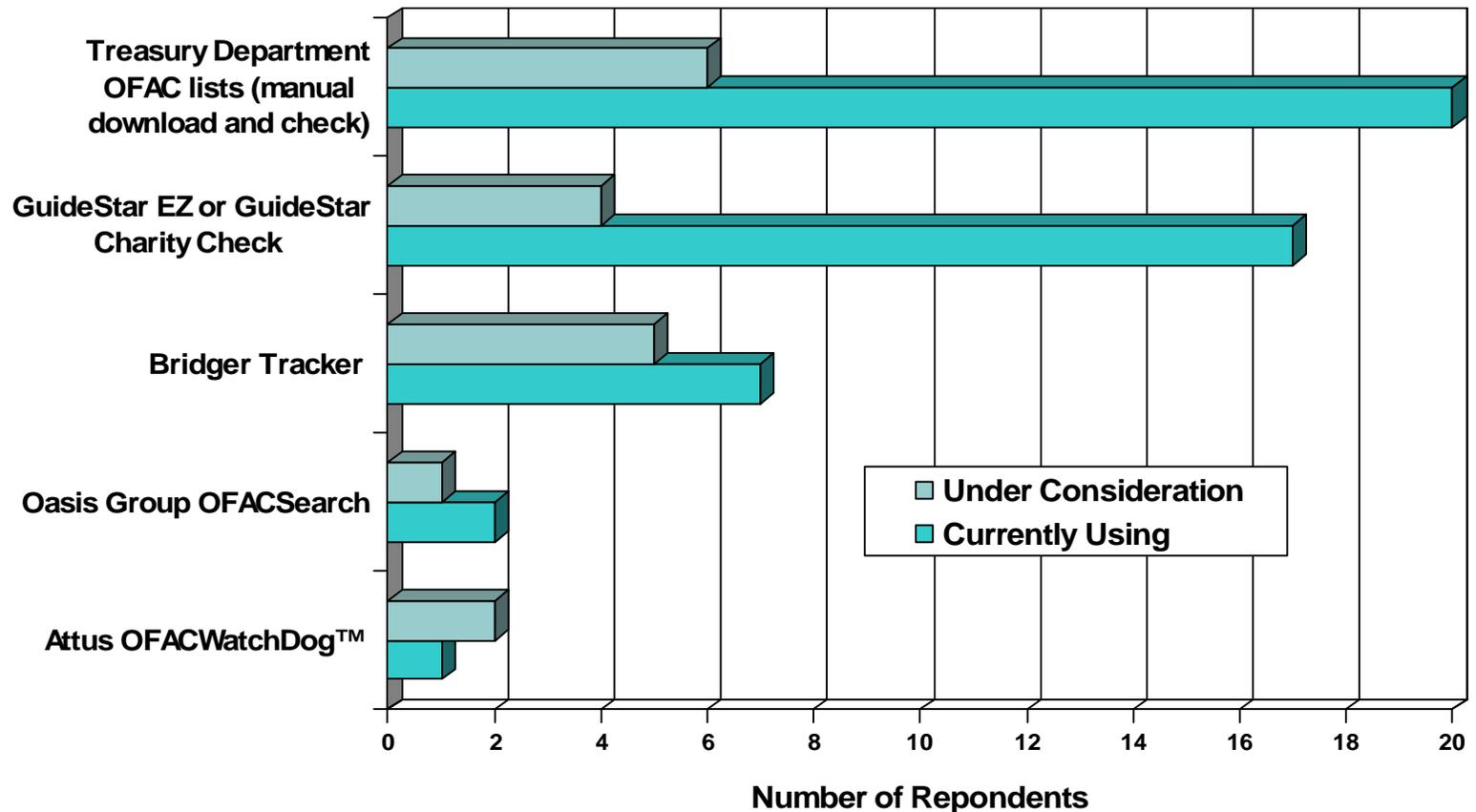
USA Patriot Act Compliance Verification Practices



28% report now doing USA Patriot Act verification checks

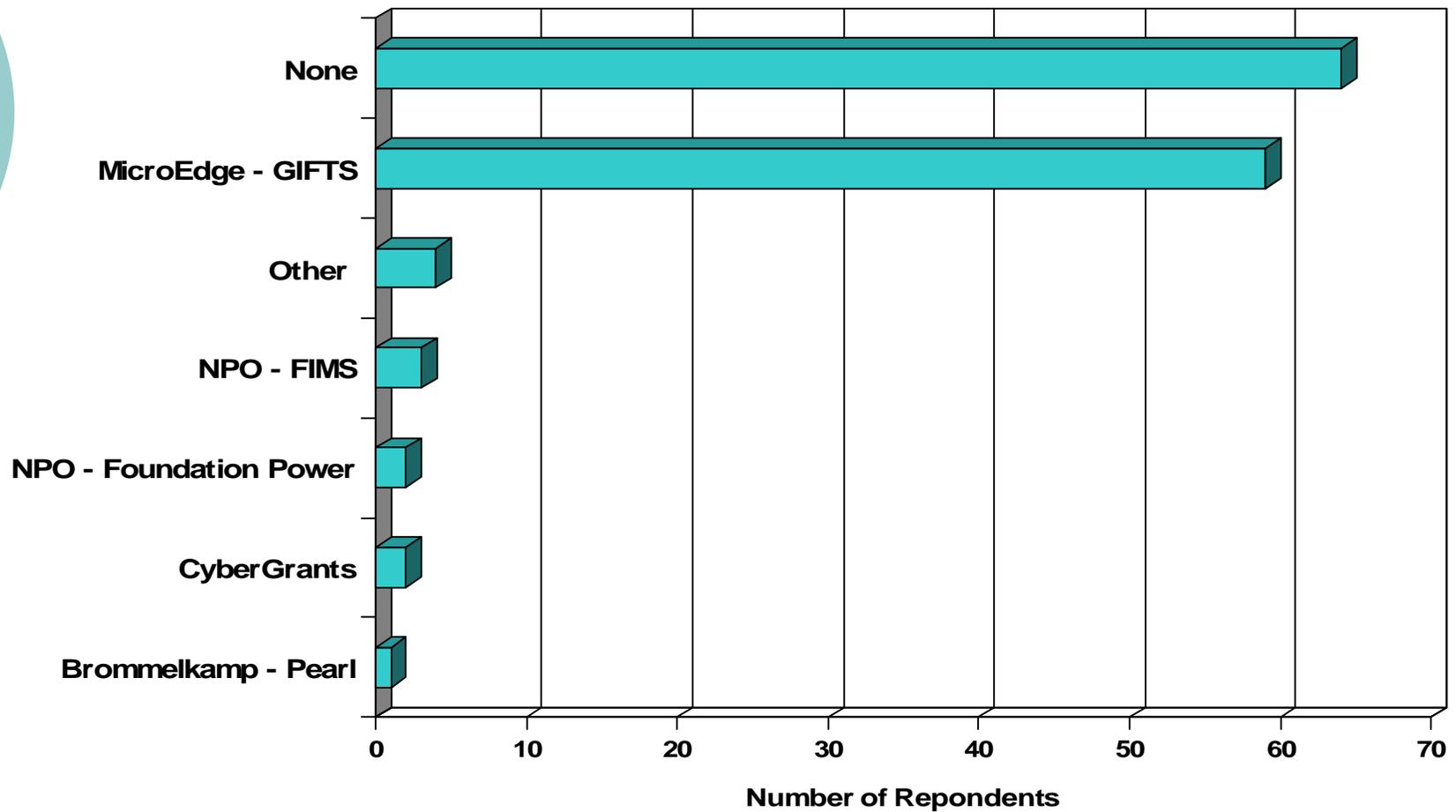
Source: GMN Online Survey March 2004 – 138 total question respondents

Which software do you use to automate verification checking?



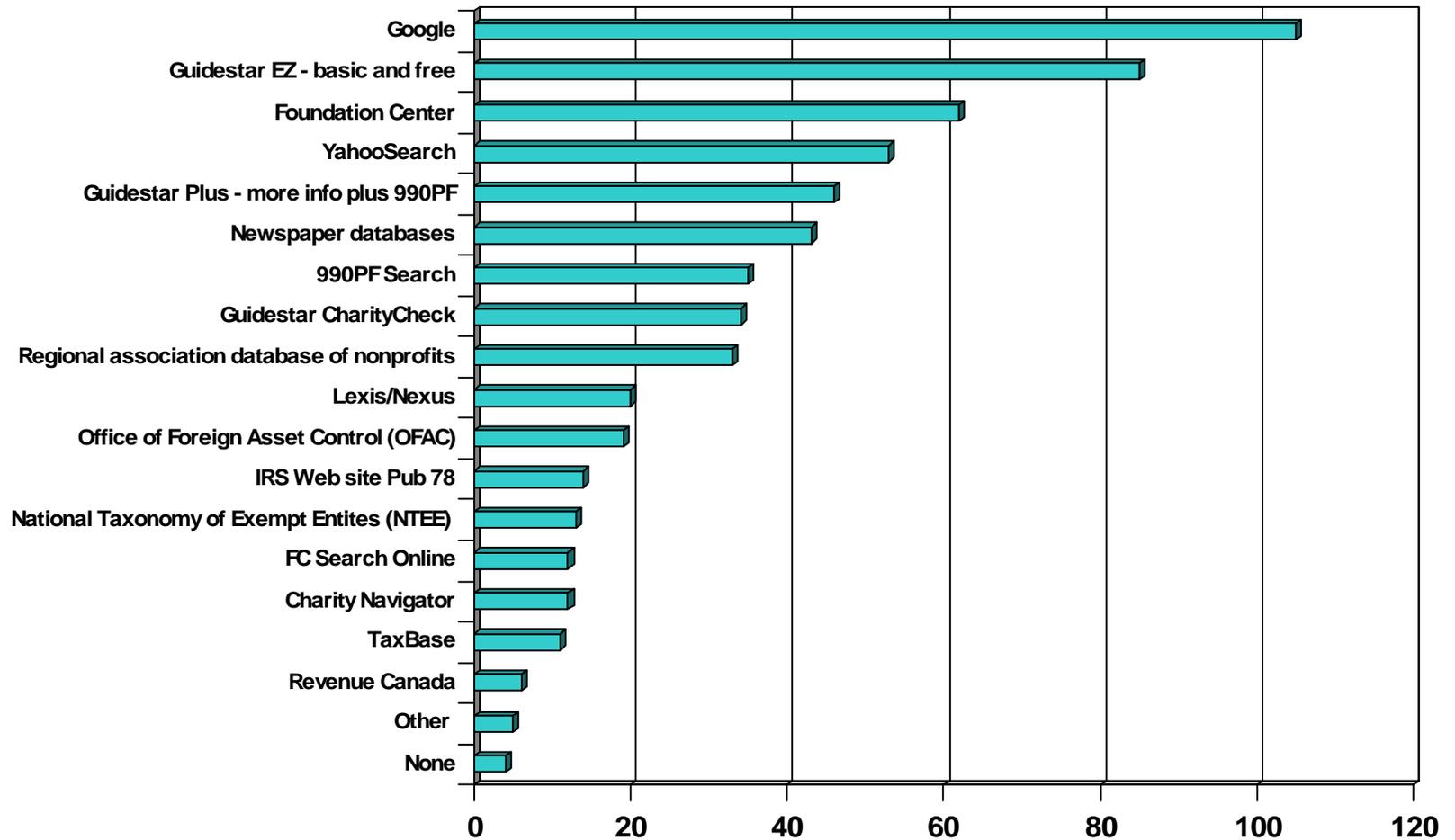
Source: GMN Online Survey March 2004

Commercial Products with Integrated Links to Due Diligence Services



Source: GMN Online Survey March 2004

Online Tools Used to Conduct Due Diligence Research



Source: GMN Online Survey March 2004



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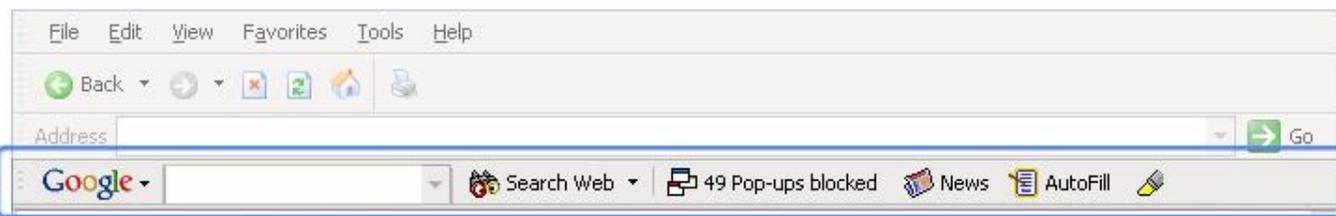
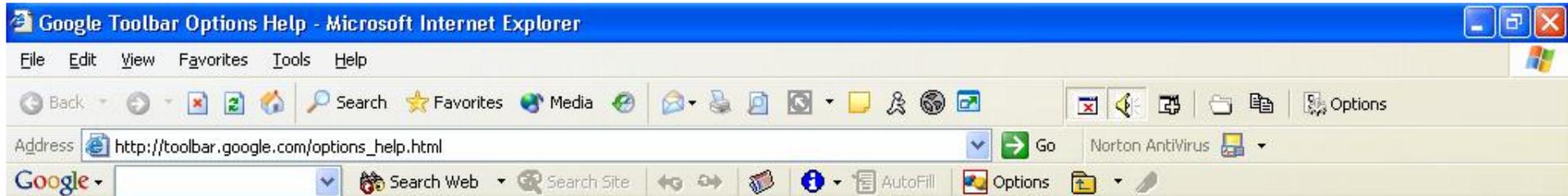
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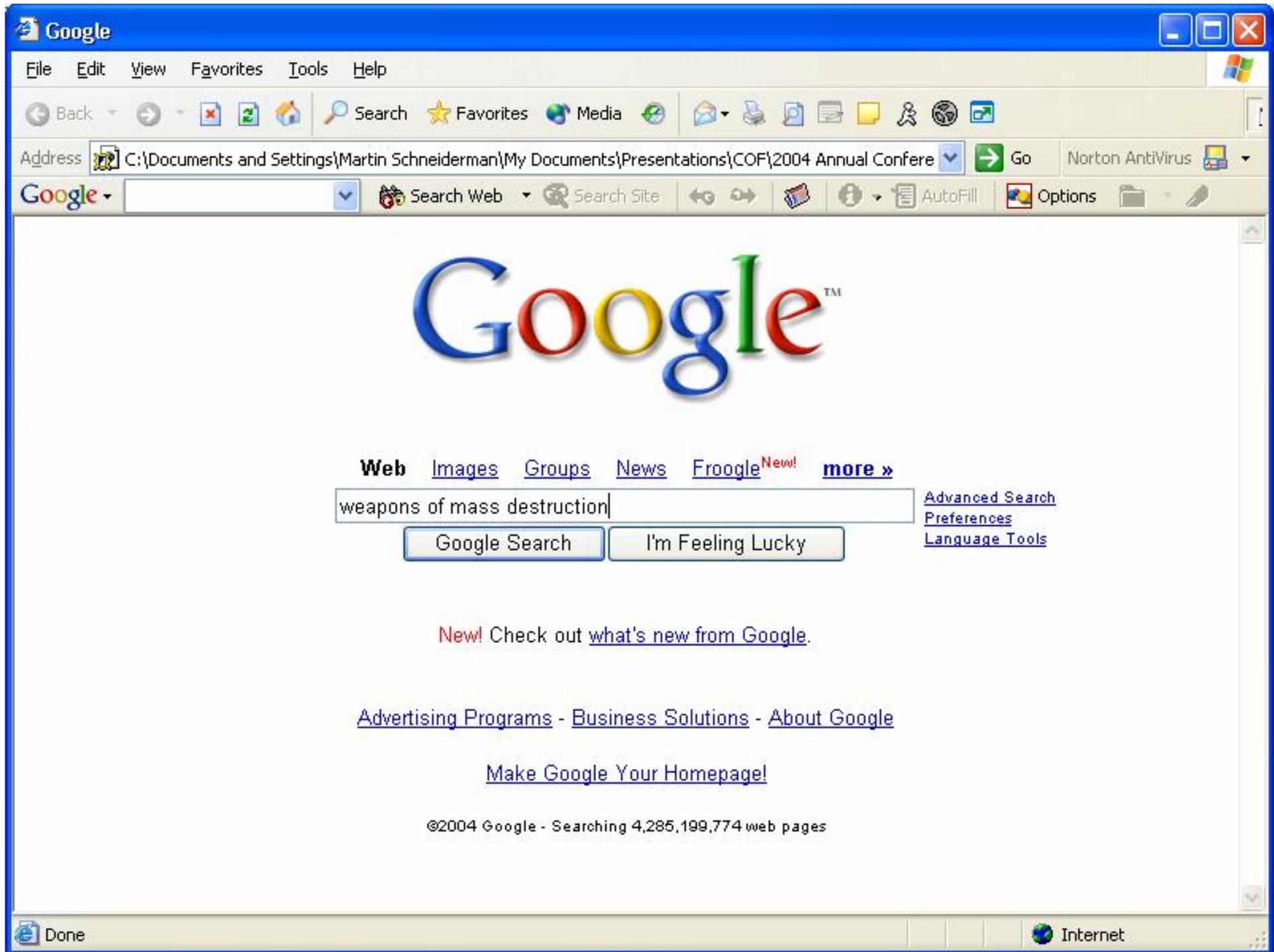
About Toolbar Options

The Google Toolbar offers a wide range of options to make your web travels more pleasant and productive. To customize your Toolbar, click the Options button or click on the Google logo in your Toolbar and select Options from the drop-down menu. The Options window contains three tabs: Options, More, and [AutoFill](#).

Options Tab

- **Searching**

- **Use Google site** - Specify which Google domain to use for your search. For example, select the `google.co.uk` domain as the default for your Toolbar searches if you are primarily interested in searching web pages from the United Kingdom. While your first search will be of the entire web, your results page will give you the extra option of viewing only those results within the `.uk` domain. See also [Search Country](#).
- **Open a new window to display results each time you search** - Opens a new browser window instead of displaying results in the current window.
- **Drop-down search history** - By default, your previous searches are stored in the drop-down list under the search box. If you would prefer not to keep past searches, clear the checkbox.
- **Highlight button** - Highlights the words you entered in the search box wherever they appear on the current page. Each term you searched for appears with a different background color. Click the highlight button to toggle this feature on or off.



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These Weapons of Mass Destruction cannot be displayed

The weapons you are looking for are currently unavailable. The country might be experiencing technical difficulties, or you may need to adjust your weapons inspectors mandate.

Please try the following:

- Click the  Regime change button, or try again later.
- If you are George Bush and typed the country's name in the address bar, make sure that it is spelled correctly. (IRAQ).
- To check your weapons inspector settings, click the **UN** menu, and then click **Weapons Inspector Options**. On the **Security Council** tab, click **Consensus**. The settings should match those provided by your government or NATO.
- If the Security Council has enabled it, The United States of America can examine your country and automatically discover Weapons of Mass Destruction. If you would like to use the CIA to try and discover them, click  [Detect weapons](#)
- Some countries require 128 thousand troops to liberate

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2. [Job Opportunities](#) 

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... New Clients. **Grants Managers Network** Selects community [apps]? to Connect Members. The **Grants Managers Network** is enabling its members to better communicate ...
www.iapps.com/News/News_show.htm?doc_id=120169 - 14k - [Cached](#) - [More pages from this site](#)
4. [Social Services Training Managers Network](#) (MICROSOFT WORD) 

Also awaiting start of new director in August. LB Lewisham Held by training manager. The first workforce development planning strategy has been written. ... alg Social Services Training **Managers Network** 9th July 2003 held at ALG Offices 59½ Southwark Street London ... Richmond AGENDA Use of New **Grants** – HRD and NTSG Borough HRD NTSG ...
www.alg.gov.uk/upload/public/Files/1/9_July_2003_Draft_minutes_SS_Training_Managers.doc - 37k - [View as html](#)
5. [Grants Network Contents](#) 

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1) [AL HARAMAIN ISLAMIC FOUNDATION INC](#)

ASHLAND, OR 97520

On February 18, 2004 (late pm), the U.S. Treasury Department froze the assets and accounts of the AL HARAMAIN ISLAMIC FOUNDATION INC, Ashland Oregon. All assets for this organization are blocked pending investigation pursuant to Section 106 of the USA PATRIOT Act of 2001, Pub.L. No. 107-56 (October 26, 2001). Although it is not now an "[SDGT]," its name and "a.k.a."s have been integrated into OFAC's SDN list with the descriptor "[BPI-PA]" to indicate that its financial assets and real property are currently blocked. For more information on the Treasury's initiative, go to <http://www.ustreas.gov/offices/eotffc/ofac/sanctions/t11ter.pdf>

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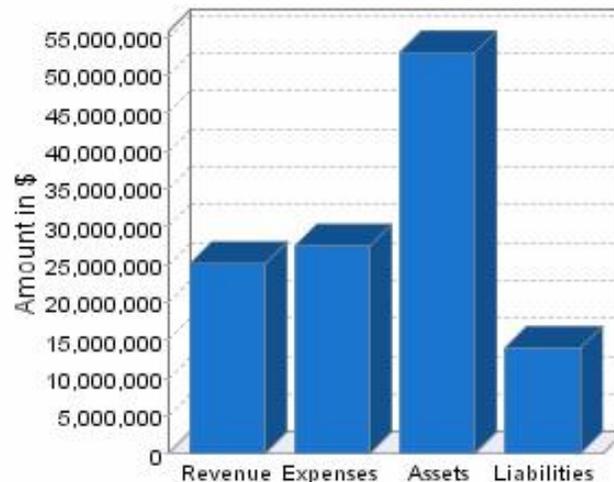
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Canada,

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EIN: 98-6001242

This organization files an IRS Form 990 or 990-EZ. It is a 501(c)(03) public charity. Information in this report is derived from IRS Form 990, 990-EZ, or 990-PF, an annual report filed by nonprofit organizations.

Financial Snapshot for Fiscal Year Ending 2003



Revenue:	\$25,070,756
Expenses:	\$27,399,607
Assets:	\$53,003,857
Liabilities:	\$13,941,362

■ Financial Indicators

OMB No 1545-0047

2002

Open to Public Inspection

Form 990 Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

Department of the Treasury Internal Revenue Service

A For the 2002 calendar year, or tax year beginning October 1, 2002, and ending January 31, 2003

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return
 Amended return
 Application pending

C Name of organization
Canadian Cancer Society
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite
10 Alcorn Avenue 200
 City or town, state or country and ZIP + 4
Toronto, Ontario, Canada M4V 3B1

D Employer identification number
98 6001242

E Telephone number
416 1961-7223

F Accounting method: Cash Accrual
 Other (specify) ▶

G Web site ▶ www.cancer.ca

H and **I** are not applicable to section 527 organizations.
H(a) Is this a group return for affiliates? Yes No
H(b) If "Yes" enter number of affiliates ▶ N/A
H(c) Are all affiliates included? Yes No
 (If "No," attach a list. See instructions.)
H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No
I Enter 4 digit GEN ▶ N/A

J Organization type (check only one) ▶ 501(c)(3) (insert no) 4947(a)(1) or 527

K Check here if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return.

L Gross receipts. Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 38,813,822

M Check if the organization is not required to attach Sch. B (Form 990, 990-EZ, or 990-PF)

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See page 17 of the instructions)

1 Contributions, gifts, grants, and similar amounts received			
a Direct public support	1a	<u>16,329,651</u>	
b Indirect public support	1b		
c Government contributions (grants)	1c		
d Total (add lines 1a through 1c) (cash \$ <u>16,329,651</u> noncash \$ _____)	1d	<u>16,329,651</u>	
2 Program service revenue including government fees and contracts (from Part VII line 93)	2		
3 Membership dues and assessments	3		
4 Interest on savings and temporary cash investments	4	<u>393,316</u>	
5 Dividends and interest from securities	5		
6a Gross rents	6a		
b Less rental expenses	6b		
c Net rental income or (loss) (subtract line 6b from line 6a)	6c		
7 Other investment income (describe ▶ _____)	7		
8a Gross amount from sales of assets other than inventory	(A) Securities		(B) Other
	8a		

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The Foundation Center's Web site offers some of the best general and specialized information retrieval tools on the Internet. If you're looking for information about foundations, you've come to the right place!

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Search the Web sites of the nonprofit sector by type or all at once. Check the boxes of the organization types you want to include in your search.

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990-PF Search

Search for a private foundation's tax return (form 990 PF) by name or Employer Identification Number (EIN). Tax returns are provided in Adobe® Portable Document Format (PDF).

Grantmaker Web Sites

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Use the **Foundation Finder** to search by name for basic information about private and community foundations in the U.S.

PND Search

Use **PND Search** to search the archives of *Philanthropy News Digest* (January 1995 to the



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Under section 501 (p) of the Internal Revenue Code, no deduction is allowed under any provision of the Code for any contribution to an organization during any period in which the organization's tax exemption is suspended under section 501 (p). No deduction is allowed under any provision of the Code for contributions made to the following organizations during the suspension period:

Benevolence International Foundation, Inc.
Palos Hills, Illinois



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- This list is updated weekly. Last update: **March 6, 2004**
- All fields are optional.
- See below for [instructions about searching](#) the online list.

Charity Name:

City:

Province:

Postal Code:

Designation:

Category Code: [Category Code description](#)

BN/Registration Number: RR

Search instructions

1. **Search by charity name:** Enter all or part of the charity's name.
 - o To refine your search, fill in one or more of the other fields or use the drop-down lists (see [Search tips](#) for details).

Français	Contact us	Help	Search	Canada Site
What's new	Media room	Electronic mailing lists	Electronic services	Forms and publications
Home	Site map			

[Tax >](#)

Charities

Canadian Registered Charities - Detail Page

- [New search](#)
- [Return to list](#)

Charity Name:
CANADIAN CANCER SOCIETY ONTARIO DIVISION

This the most current information provided by the charity itself. The Charities Directorate provides the BN/Registration number, the category code, and the designation code. The Charities Directorate has not necessarily verified the information provided by the Charity.

Registered Charity Information Returns are available online starting with those filed for fiscal periods ending in 2000.

Please note that only charities that filed using the Registered Charity Information Returns Form, version T3010(00), (01), (02) and T3010A are displayed online.

BN/Registration Number: 118829803RR0006
Correspondence Language: English
Address: 1639 YONGE ST
City: TORONTO
Province: ON
Postal Code: M4T2W6
Country: CA
Category Code: 11. Services Other Than Hospitals
Designation: C. Charitable Organization



CHARITY NAVIGATOR

your guide to intelligent giving

Saturday, March 13, 2004

- ABOUT US
- METHODOLOGY
- TIPS & RESOURCES
- ARTICLES
- MY TOOLS
- SUPPORT US
- CONTACT US



CHARITY SEARCH

Search Our Database of Over 2,900 Charity Ratings

search by keyword

enter keywords here

search

browse by category

select

browse

browse by region

select

browse

[All 4-Star Charities](#)

[All Charities: Alphabetical](#)

[Advanced Search](#)

Did You Know?

79% of Americans view youth development and recreation organizations as honest and ethical.

Video



WELCOME TO CHARITY NAVIGATOR

Charity Navigator, America's premiere independent charity evaluator, works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of America's largest charities.

[View NEW & UPDATED charities \(Mar '04\)](#)

SIGN UP TO BE A MEMBER

to access expanded features it's simple and free

- Create a charity portfolio
- Compare charities
- View more in-depth info

[CLICK TO SEE A PREVIEW](#)

CN TOP 10

10 Charities Expanding in a Hurry

1. Peninsula Open Space Trust
2. Delaware & Raritan Greenway
3. Lance Armstrong Foundation

[see the complete list](#)

[see all lists](#)

RECENT ARTICLES

Maximizing the Benefits of Charitable Giving **NEW!**

Last year, Americans claimed \$134 billion in tax deductions for charitable contributions. 30.2% of all returns, the highest number recorded...

National Nutrition Month



Featured Charities

- > [Action Against Hunger-USA](#)
- > [Capital Area Food Bank](#)
- > [Operation USA](#)
- > [Philabundance](#)
- > [Senior Cleaners](#)

CHARITY NAVIGATOR IN THE NEWS

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PHILANTHROPY NEWS

[Habitat for Humanity Voices Resolve](#)
Mar 12, 2004



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Did You Know?

Almost 90 percent of U.S. smokers begin at or before age 18.

Of Interest

- > Visit the Methodology section to learn how we evaluate charities.
- > Before you give, consult our Tips & Resources section.

CHARITY SUMMARY

[Human Services](#) > [Youth Development, Shelter, and Crisis Services](#)
[South](#) > [Georgia](#)

-
-
-
-

Boys & Girls Clubs of America

The positive place for kids

Atlanta, GA 30309

RATINGS

OVERALL RATING: ★★★★★ (68.86)

ORGANIZATIONAL EFFICIENCY

Fundraising Efficiency	\$0.03
Fundraising Expenses	3.0%
Program Expenses	88.6%
Administration Expenses	8.4%

EFFICIENCY RATING: ★★★★ (38.86)

ORGANIZATIONAL CAPACITY

Primary Revenue Growth	15.2%
Program Expenses Growth	26.6%
Working Capital Ratio (years)	1.37

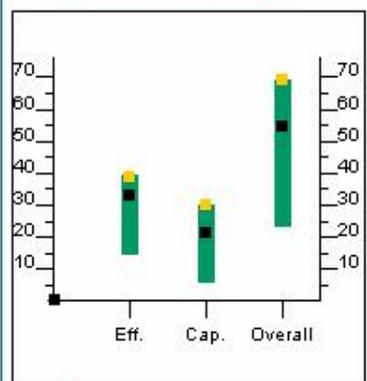
CAPACITY RATING: ★★★★ (30.00)

PEER ANALYSIS

Charity Name	Overall Score	Overall Rating

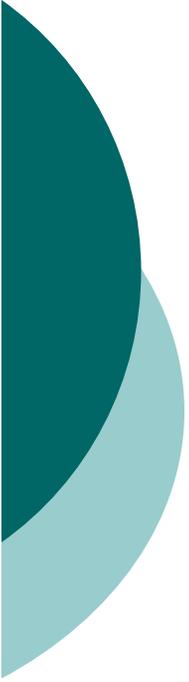
CHARTS

COMPARISON BY CAUSE:



■ range of scores in cause
 ■ average score in cause
 ■ this charity

REVENUE/EXPENSES TREND:



Reference Links

- i www.charitynavigator.org
- i www.google.com
- i www.guidestar.org
- i www.fdncenter.org
- i www.irs.gov/charities/article/0,,id=96136,00.html
- i www.lexis.com
- i www.taxbase.com
- i www.yahoo.com

U.S. Patriot Act and OFAC Compliance Verification Tools

- i **Bridger Insight**
- i **ChoicePoint** (acquired Bridger)
- i **Equifax**
- i **GuideStar**
 - | EZ Basic Information
- i **OFACSearch**
- i **RDC (Regulatory Data Corporation)**
 - | **GRID (Global Regulatory Information Database)**



Seeking a
Safe



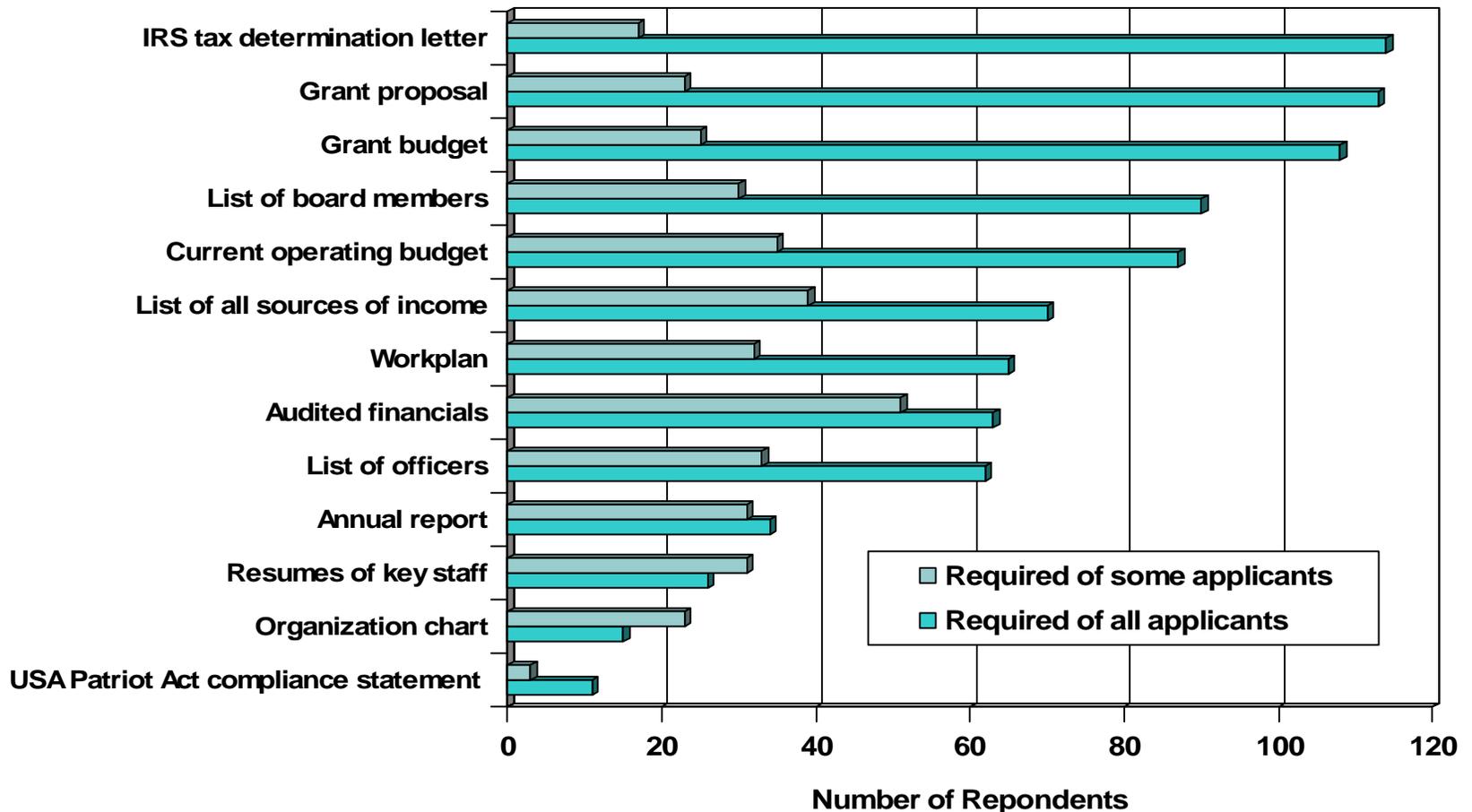
©Mark M. Lawrence/Corbis

Harbor



Time for a few questions . . .
then on to the case studies!

Which documents are required as part of your pre-award due diligence?



Source: GMN Online Survey March 2004

GuideStar EZ
Basic Information

GuideStar Plus

- [Summary](#)
- [Mission & Programs](#)
- [Goals & Results](#)
- [Contact Info](#)
- [Financials](#)
- [Board of Directors](#)
- [Form 990](#)
- [Full Report](#)

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- [GS Pro](#)

Want to learn more about this organization?

CityTeam Ministries

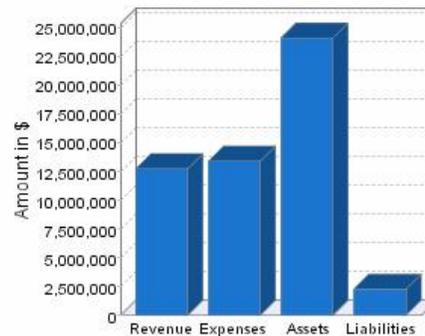
2304 Zanker Rd
San Jose, CA 95131

Founded in 1957, CityTeam Ministries serves the needs of the urban poor and homeless in San Jose, San Francisco and Oakland CA, Portland OR, Seattle WA and Philadelphia PA providing emergency services and long-term rehabilitation programs.

EIN: 94-1501265

This organization files an IRS Form 990 or 990-EZ. It is a 501(c)(03) public charity. Information in this report was supplied by the nonprofit organization within the last two years.

Financial Snapshot for Fiscal Year Ending 2002



Revenue:	\$12,715,551
Expenses:	\$13,363,435
Assets:	\$24,106,292
Liabilities:	\$2,285,335

Financial Indicators

Definitions

How to Help

This organization is seeking funds from contributions and grants. These funds will be used for unrestricted operating expenses and special projects.

Back to Top

*An Analyst Report is available for this organization.

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CityTeam Ministries

2304 Zanker Rd
San Jose, CA 95131

<http://www.cityteam.org>

Mission

To glorify God by serving people in need, proclaiming the gospel and establishing disciples among the disadvantaged people of cities.

Programs

CityTeam provides effective programs serving the needs of the urban poor and disadvantaged including men's recovery programs, women's abuse/recovery programs, shelter and counseling for pregnant homeless women, neighborhood youth outreach centers as well as providing food, clothing and life skills programs to needy urban families.

Accomplishments for Fiscal Year Ending 08/31/2003

1. We provided 394,000 hot meals and 130,000 nights of shelter to the homeless. 43,000 food boxes were provided to needy families.
2. Nearly 300 men and women participated in our abuse and addiction recovery programs.
3. 450 at-risk youth participated on a regular basis in one of our neighborhood youth outreach centers. 600 youth attended a one week summer camp.

Objectives for Fiscal Year Beginning 09/01/2003

1. Continue to meet the needs of the urban poor and disadvantaged in a continuing weak economy.
2. Improve the delivery of essential services to the needy by moving from our present centralized provision of services to neighborhood partnerships and delivery platforms.

Self Assessment

CityTeam has reached capacity for delivery services using our traditional centralized delivery model. We are now moving to neighborhood delivery sites with partnerships between local neighborhood organizations, former clients and sponsoring organizations with resources and volunteers to increase capacity.

Chief Executive Profile

Pat Robertson joined CityTeam in 1957 and has overseen the transformation of the organization from a small rescue mission in downtown San Jose to a broad based provider of effective programs to the urban poor and disadvantaged of six cities domestically and the development of partnerships with similar organizations in eight countries internationally.

Pat has served in leadership positions with the Christian Management Association (past President), International Union of Gospel Missions (board member and chairman of the Development Track and is currently a fellow in the American Leadership Forum of Silicon Valley.

Pat and his wife Kathy have three children and one grandson.

Financial Data

Revenue and Expenses: Fiscal Year Ending August 31, 2002

Basic Information

This organization files an IRS Form 990 or 990-EZ.

EIN: 94-1501265

Contact: Mr. Jeff Davis,
Foundations Relations
Manager

Phone: (408) 232-5600

Fax: (408) 436-0702

E-mail: jadavis@cityteam.org

Income: \$12,715,551

Assets: \$24,106,292

Fiscal Year: 2002

Year: 1957

Founded: 9

No. of Board Members:

No. of Full Time Employees:

No. of Part-Time Employees:

Volunteers: 101-500

Audited Statements Available to Public:

Funding: This organization is seeking funds from contributions and grants. These funds will be used for unrestricted operating expenses and special projects.

Locations Served: San Jose, San Francisco and Oakland CA, Portland OR, Seattle WA and Philadelphia, PA

Board of Directors

Tom Gutshall, Chairman

990 Return of Organization Exempt From Income Tax OMB No. 1545-0047
2001
 Open to Public Inspection

Department of the Treasury
 Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2001 calendar year, or tax year period beginning **SEP 1, 2001** and ending **AUG 31, 2002**

B Check if applicable:
 Address change
 Name change
 Extension of tax-exempt status
 Change in principal officer
 Change in governing authority

C Name of organization: **CITYTEAM MINISTRIES**
 Number and street (or P.O. box if mail is not delivered to street address): **2304 ZANKER ROAD**
 City or town, state or country, and ZIP + 4: **SAN JOSE, CA 95131-1115**

D Employer identification number: **94-1501265**
E Telephone number: **(408) 232-5600**

F Accounting method: Cash Accrual

G Web site: **WWW.CITYTEAM.ORG**

J Organization type (see instructions): 501(c)(3) 501(c)(29) 527

K Check here: if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return.

L Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12: **13,500,915.**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances

1 Contributions, gifts, grants, and similar amounts received	1a	10,340,910.
2 Direct public support	2a	
3 Indirect public support	3a	
4 Government contributions (grants)	4a	
5 Total (add lines 1a through 4a)	5a	10,340,910.
6 Program service revenue including government fees and contracts (from Part VII, line 92)	6a	530,604.
7 Membership dues and assessments	7a	3.
8 Interest on savings and temporary cash investments	8a	169,855.
9 Dividends and interest from securities	9a	
10 Gross rents	10a	1,602,447.
11 Less: rental expenses	11a	241,799.
12 Net rental income or (loss) (subtract line 11a from line 10a)	12a	1,440,648.
13 Other investment income (describe):	13a	
14 Gross amount from sale of assets other than inventory	14a	
15 Less: cost or other basis and sales expenses	15a	744,195.
16 Gain or (loss) (attach schedule)	16a	543,565.
17 Net gain or (loss) (combine line 16, column (A) and (B))	17a	200,630.
18 Special events and activities (attach schedule)	18a	
19 Gross revenue (not including \$ of contributions reported on line 1a)	19a	
20 Less: direct expenses (other than fundraising expenses reported on line 1a)	20a	
21 Net income or (loss) from special events (subtract line 20a from line 19a)	21a	
22 Gross sales of inventory, less returns and discounts	22a	
23 Less: cost of goods sold	23a	
24 Gross profit or (loss) from inventory (subtract line 23a from line 22a)	24a	
25 Other revenue (from Part VII, line 103)	25a	32,904.
26 Total revenue (add lines 1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, 10a, 11a, 12a, 13a, 14a, 15a, 16a, 17a, 18a, 19a, 20a, 21a, 22a, 23a, 24a, 25a, and 26a)	26a	12,715,551.
27 Program services (from line 4a, column (B))	27a	8,300,742.
28 Management and general (from line 4a, column (C))	28a	2,067,025.
29 Fundraising (from line 4a, column (D))	29a	2,995,668.
30 Payments to affiliates (attach schedule)	30a	
31 Total expenses (add lines 27a, 28a, 29a, 30a, and 31a)	31a	13,363,435.
32 Excess or (deficit) for the year (subtract line 31a from line 26a)	32a	-647,884.
33 Net assets or fund balances at beginning of year (from line 73, column (A))	33a	22,468,841.
34 Other changes in net assets or fund balances (attach explanation)	34a	0.
35 Net assets or fund balances at end of year (combine lines 33a, 34a, and 32a)	35a	21,820,957.

36 UVA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2001)

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GuideStar Analyst Report

CityTeam Ministries
2304 Zanker Rd
San Jose, CA 95131

94-1501265

Contact Info
Tel: (408) 232-5600
Email: jadavis@cityteam.org
Contact: Mr. Jeff Davis, Foundations Relations Manager
Web Site: www.cityteam.org

Mission

To glorify God by serving people in need, proclaiming the gospel and establishing disciples among the disadvantaged people of cities.

Programs

CityTeam provides effective programs serving the needs of the urban poor and disadvantaged including men's recovery programs, women's abuse/recovery programs, shelter and counseling for pregnant homeless women, neighborhood youth outreach centers as well as providing food, clothing and life skills programs to needy urban families.

Goals and Results

Accomplishments for Fiscal Year Ending: August 31, 2003

We provided 364,000 hot meals and 130,000 nights of shelter to the homeless. 43,000 food boxes were provided to needy families.

Nearly 300 men and women participated in our abuse and addiction recovery programs.

450 at-risk youth participated on a regular basis in one of our neighborhood youth outreach centers. 600 youth attended a one week summer camp.

Objectives for Fiscal Year Beginning: September 1, 2003

Continue to meet the needs of the urban poor and disadvantaged in a continuing weak economy.

Improve the delivery of essential services to the needy by moving from our present centralized provision of services to neighborhood partnerships and delivery platforms.

Self Assessment

CityTeam has reached capacity for delivery services using our traditional centralized delivery model. We are now moving to neighborhood delivery sites with partnerships between local neighborhood organizations, former clients and sponsoring organizations with resources and volunteers to increase capacity.

Leaders of the Organization

Chief Executive Profile

Pat Robertson joined CityTeam in 1957 and has overseen the transformation of the organization from a small rescue mission in downtown San Jose to a broad based provider of effective programs to the urban poor and disadvantaged of six cities domestically and the development of partnerships with similar organizations in eight countries internationally.

1