# CALIFORNIA HUMANITIES

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## APPENDIX

<table>
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<tr>
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</table>
MISSION
To connect Californians to ideas and one another in order to understand our shared heritage and diverse cultures, inspire civic participation, and shape our future.

CEO AND PRESIDENT
Rick Noguchi

BOARD CHAIR
Oliver Rosales

SUBJECT AREA
Humanities

NTEE Code
Humanities Organizations (A70)
PROGRAMS

1. California Documentary Project
   Population(s) served:

2. Humanities for All
   Population(s) served:

3. Library Innovation Lab
   Population(s) served: Adults, Children and youth, Adults, Children and youth, Immigrants and migrants

4. Civics + Humanities Middle Grades
   Population(s) served: Adolescents, Preteens

5. Literature & Medicine®
   Population(s) served: Adults

6. Emerging Journalist Fellowship
   Population(s) served: Young adults, Students, Teachers

POPULATIONS SERVED

1. Children
2. Preteens
3. Adolescents
4. Adults
5. Ethnic and racial groups

COMPLIANCE

- IRS Pub 78 Verified as of July 2023
- IRS BMF 509(a) (1) as of July 10, 2023
- A-133 Audit Required/Performed?
- Conflict of Interest Policy
- Written whistleblower policy

TRANSPARENCY MEASURES

- Board Practices Reported?
- Diversity Data Reported?
19 Number of Independent Board Members
Programs & Results

PROGRAMS

Source: Self-Reported by Organization, May 2023

California Documentary Project
Population(s) Served: n/a

The California Documentary Project (CDP) is a competitive grant program that supports the research and development and production stages of film, audio, and digital media projects that seek to document California in all its complexity. Projects should use the humanities to provide context, depth and perspective and reach and engage broad audiences through multiple means, including but not limited to radio and television broadcasts, podcasts, online distribution and interactive media, community screenings and discussions, in classrooms and libraries, at cultural centers, film festivals, and beyond. Funding is available in three categories: Research and Development Grants, Production Grants, and NextGen Grants.

Humanities for All
Population(s) Served: n/a

Humanities for All is a grant program that supports locally-initiated public humanities projects. This program responds to the needs and interests of Californians, encourages greater public participation in humanities programming, particularly by new and/or underserved audiences. It aims to promote understanding and empathy among all our state’s peoples in order to cultivate a thriving democracy. Funding is available in two tracks: Project Grants and Quick Grants.

Library Innovation Lab
Population(s) Served: n/a

Literature & Medicine®
Population(s) Served: n/a

Literature & Medicine® is a nationally recognized humanities-based professional development program for health care workers that engages clinical staff members in reading and discussion programs facilitated by humanities scholars. Through reading, reflection, and conversation, the program invites care-givers to better understand and empathize with the experience of their patients – as well as their peers. Long-term program evaluation provides strong evidence that the program increases job satisfaction, lessens burnout, improves communications skills, and builds “cultural competency” among participants, all towards the desired end of improving the quality of health care for patients.

Emerging Journalist Fellowship
Population(s) Served: n/a

The Emerging Journalist Fellowship program (formerly called CA 2020: Democracy and the Informed Citizen) is designed to support and amplify student journalists’ voices and perspectives who are enrolled at California community colleges. Launched in 2020 with support from the Andrew W. Mellon Foundation through the Federation of State Humanities Councils, this program grew out of our statewide initiative, CA 2020: Youth Perspective and the Future of California.
### Financials

**FISCAL YEAR START:** 01/01  
**FISCAL YEAR END:** 12/31  
- Financials audited by an independent accountant

### Financials Quick View

- **Total revenue, gains, and other support per audited financial statements:** $6,928,728
- **Total expenses and losses per audited financial statements:** $6,092,059
- **Surpluses in last 5 years:** 4
- **Negative Net Assets in past 5 years:** 0

### Financial Trends Analysis

#### Business Model Indicators

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<tr>
<th>Profitability</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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<tr>
<td>Unrestricted surplus (deficit) before depreciation</td>
<td>-$4,822</td>
<td>$15,155</td>
<td>-$17,357</td>
<td>-$6,017</td>
<td>$49,028</td>
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<td>As a % of expenses</td>
<td>-0.2%</td>
<td>0.5%</td>
<td>-0.5%</td>
<td>-0.1%</td>
<td>0.8%</td>
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<tr>
<td>Unrestricted surplus (deficit) after depreciation</td>
<td>-$11,888</td>
<td>$7,009</td>
<td>-$23,940</td>
<td>-$13,588</td>
<td>$41,838</td>
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<td>As a % of expenses</td>
<td>-0.4%</td>
<td>0.2%</td>
<td>-0.7%</td>
<td>-0.3%</td>
<td>0.7%</td>
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</tbody>
</table>

#### Revenue Composition

- **Total revenue (unrestricted & restricted):** $2,920,444
- **Total revenue, % change over prior year:** 16.2%
- **Program services revenue:** 0.0%
- **Membership dues:** 0.0%
- **Investment income:** 0.0%
- **Government grants:** 86.9%
- **All other grants and contributions:** 13.1%
- **Other revenue:** 0.0%

#### Expense Composition

- **Total expenses before depreciation:** $2,725,770
- **Total expenses, % change over prior year:** 8.6%
- **Personnel:** 38.3%
- **Professional Fees:** 11.7%
- **Occupancy:** 4.8%
- **Interest:** 0.0%
- **Pass-Through:** 34.7%
- **All other expenses:** 10.5%
Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

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<tr>
<th>Full Cost Components (estimated)</th>
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<th>2018</th>
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<th>2020</th>
<th>2021</th>
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<td>Total Expenses (after depreciation)</td>
<td>$2,732,836</td>
<td>$2,983,623</td>
<td>$3,301,061</td>
<td>$4,758,139</td>
<td>$6,055,013</td>
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<td>One Month of Savings</td>
<td>$227,148</td>
<td>$247,956</td>
<td>$274,540</td>
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<td>Fixed Asset Additions</td>
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<tr>
<td>Total Full Costs (estimated)</td>
<td>$2,969,703</td>
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<td>$3,575,601</td>
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Capital Structure Indicators

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<td>Months of cash</td>
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<td>5.6</td>
<td>5.5</td>
<td>3.5</td>
<td>3.4</td>
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<tr>
<td>Months of cash and investments</td>
<td>4.8</td>
<td>5.6</td>
<td>5.5</td>
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<td>3.4</td>
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<tr>
<td>Months of estimated liquid unrestricted net assets</td>
<td>2.7</td>
<td>2.6</td>
<td>2.2</td>
<td>1.5</td>
<td>1.3</td>
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Balance Sheet Composition

| Cash                                      | $1,081,481 | $1,378,981 | $1,517,887 | $1,392,439 | $1,696,481 |
|Investments                                | $0         | $0         | $0         | $0         | $0         |
|Receivables                                | $625,313   | $411,847   | $1,151,145 | $651,822   | $1,047,066 |
|Gross land, buildings, and equipment (LBE) | $61,349    | $63,024    | $68,740    | $68,740    | $68,740    |
|Accumulated depreciation (% of LBE)        | 36.0%      | 48.0%      | 53.6%      | 64.6%      | 75.0%      |
|Liabilities (as % of LBE)                 | 46.1%      | 48.0%      | 42.4%      | 55.7%      | 36.8%      |
|Unrestricted net assets                    | $663,014   | $670,023   | $646,083   | $632,495   | $674,333   |
|Temporarily restricted net assets          | $266,626   | $267,150   | N/A        | N/A        | N/A        |
|Permanently restricted net assets          | $32,136    | $32,136    | N/A        | N/A        | N/A        |
|Total restricted net assets                | $298,762   | $299,286   | $917,636   | $288,280   | $1,083,111 |
|Total net assets                          | $961,776   | $969,309   | $1,563,719 | $920,775   | $1,757,444 |

Key Data Checks

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<th>Material Data Errors</th>
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Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit’s financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- Formulas for key metrics
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
Operations

Source: Self-Reported by Organization, May 2023

CEO AND PRESIDENT

Rick Noguchi

As a philanthropic and nonprofit professional with more than 20 years of experience, I have held leadership positions in program development, fundraising, and management. With a Masters in Business Administration and a Masters in Fine Arts, I bring a creative and entrepreneurial approach to strategy and community development that results in a positive impact. Throughout my career, I've been most known for being strategic, having vision, and being organized.

NUMBER OF EMPLOYEES

Source: IRS Form 990

BOARD CHAIR

Oliver Rosales
### OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

#### FISCAL YEAR 2021

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<td>Bennett Peji</td>
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<tr>
<td>Wendy Fong</td>
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<tr>
<td>Brian Aguilar</td>
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<tr>
<td>Thomas K Arnold</td>
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<tr>
<td>Neha Balram</td>
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<td>Bidhan Chandra Roy</td>
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<td>Fritz Friedman</td>
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<td>Rachel Hatch</td>
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<tr>
<td>Mina Para Matlon</td>
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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES
### FISCAL YEAR 2019

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<td>Oliver Rosales</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
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</tr>
<tr>
<td>John Szabo</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
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</tr>
<tr>
<td>Jessica Weare</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Penelope Wong</td>
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<td>$0</td>
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</tbody>
</table>
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES
### FISCAL YEAR 2018

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
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<th>Related</th>
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<tr>
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<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Honora Chapman</td>
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<td>$0</td>
</tr>
<tr>
<td>Jacquelyn Crabtree</td>
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<td>$0</td>
<td>$0</td>
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</tr>
<tr>
<td>Fritz Friedman</td>
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<td>$0</td>
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<tr>
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<td>Bennett Peji</td>
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<td>Julie Su</td>
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<tr>
<td>Alice Y Hom</td>
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<td>$0</td>
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</tr>
<tr>
<td>Tricia Wynne</td>
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</table>
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES
### FISCAL YEAR 2017

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
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<td>PRESIDENT &amp; CEO</td>
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<tr>
<td>Alice Y. Hom</td>
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<tr>
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<td>Brenda Wright</td>
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</table>
## HIGHEST PAID EMPLOYEES
### FISCAL YEAR 2021

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
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</thead>
<tbody>
<tr>
<td>Felicia Kelley</td>
<td>DIRECTOR OF PROJECT &amp; EVAL</td>
<td>$114,221</td>
<td>$25,030</td>
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<tr>
<td>Sheri Kuehl</td>
<td>DIRECTOR OF DEVELOPMENT</td>
<td>$110,545</td>
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## HIGHEST PAID EMPLOYEES
### FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
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<td>Felicia Kelley</td>
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<td>$109,583</td>
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<td>Sheri Kuehl</td>
<td>DIRECTOR OF DEVELOPMENT</td>
<td>$108,066</td>
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## HIGHEST PAID EMPLOYEES
### FISCAL YEAR 2019

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<thead>
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<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Felicia Kelley</td>
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<td>$105,840</td>
<td>$23,287</td>
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<td>Sheri Kuehl</td>
<td>DIRECTOR OF DEVELOPMENT</td>
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<td>$18,122</td>
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## HIGHEST PAID EMPLOYEES

**FISCAL YEAR 2018**

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<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<th>Other</th>
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<tbody>
<tr>
<td>Felicia Kelley</td>
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<td>$100,975</td>
<td>$22,991</td>
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### Contractors

#### FISCAL YEAR 2020

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<th>Name</th>
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<th>Type of Service</th>
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</thead>
<tbody>
<tr>
<td>Shea Labagh Dobberstein Cpas &amp; Advisors</td>
<td>44 MONTGOMERY ST STE 3200, SAN FRANCISCO 94104</td>
<td>ACCOUNTING</td>
<td>$142,215</td>
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#### FISCAL YEAR 2019

<table>
<thead>
<tr>
<th>Name</th>
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<th>Compensation</th>
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</thead>
<tbody>
<tr>
<td>Shea Labagh Dobberstein Cpas &amp; Advisors</td>
<td>44 MONTGOMERY ST STE 3200, SAN FRANCISCO 94104</td>
<td>ACCOUNTING</td>
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<tr>
<td>East Bay Asian Local Development Corp</td>
<td>1825 SAN PABLO AVE STE 200, OAKLAND 94612</td>
<td>FACILITIES</td>
<td>$101,106</td>
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**Paid Preparers**

**FISCAL YEAR 2021**

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHRISTY WHITE ASSOCIATES</td>
<td>272956198</td>
<td>348 OLIVE STREET, SAN DIEGO CA 92103</td>
<td>6192708222</td>
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**Paid Preparers**

**FISCAL YEAR 2020**

<table>
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<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
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<tr>
<td>CHRISTY WHITE ASSOCIATES</td>
<td>27-2956198</td>
<td>348 OLIVE STREET, SAN DIEGO CA 92103 USA</td>
<td>619-270-8222</td>
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**Paid Preparers**

**FISCAL YEAR 2019**

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<th>Firm EIN</th>
<th>Firm Address</th>
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<tbody>
<tr>
<td>CHRISTY WHITE ASSOCIATES</td>
<td>27-2956198</td>
<td>348 OLIVE STREET, SAN DIEGO CA 92103 USA</td>
<td>619-270-8222</td>
</tr>
</tbody>
</table>
## BOARD LEADERSHIP PRACTICES
GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

### BOARD ORIENTATION & EDUCATION
Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?  
**Yes**

### CEO OVERSIGHT
Has the board conducted a formal, written assessment of the chief executive within the past year?  
**Yes**

### ETHICS & TRANSPARENCY
Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?  
**Yes**

### BOARD COMPOSITION
Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?  
**Yes**

### BOARD PERFORMANCE
Has the board conducted a formal, written self-assessment of its performance within the past three years?  
**Not Applicable**
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

*The organization’s leader identifies as:*

**Race & Ethnicity**  
Asian/Asian American

**Gender Identity**  
Male, Not transgender (cisgender)

**Sexual Orientation**  
Decline to state

**Disability Status**  
Person without a disability

### Race & Ethnicity

<table>
<thead>
<tr>
<th></th>
<th>Board Members</th>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian/Asian American</td>
<td>24%</td>
<td>16%</td>
<td>0%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>12%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Hispanic/Latino/Latinx</td>
<td>12%</td>
<td>27%</td>
<td>56%</td>
</tr>
<tr>
<td>Middle Eastern/North African</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Native American/American Indian/Alaska</td>
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<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Native Hawaiian/Pacific Islander</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>White/Caucasian/European</td>
<td>35%</td>
<td>45%</td>
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<tr>
<td>Multi-Racial/Multi-Ethnic (2+ races/ethnicities)</td>
<td>18%</td>
<td>9%</td>
<td>0%</td>
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<tr>
<td>People who prefer to identify with another race or ethnicity</td>
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</tr>
<tr>
<td>Unknown or decline to state</td>
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</tbody>
</table>

### Gender Identity

<table>
<thead>
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<th></th>
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<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>66%</td>
<td>64%</td>
<td>60%</td>
</tr>
<tr>
<td>Male</td>
<td>35%</td>
<td>36%</td>
<td>36%</td>
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<tr>
<td>Non-binary</td>
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<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
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<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Sexual Orientation

*No data*

### Disability

*No data.*

*We do not display staff or senior staff disability information for organizations with fewer than 15 staff.*
## Appendix

### Key Documents

<table>
<thead>
<tr>
<th>IRS Forms 990</th>
<th>2021 990</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2020 990</td>
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<tr>
<td></td>
<td>2019 990</td>
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<tr>
<td></td>
<td>2018 990</td>
</tr>
<tr>
<td>IRS Forms 990T</td>
<td>Not Available</td>
</tr>
<tr>
<td>Audited Financial Statements</td>
<td>2021 Audited Financial Statement</td>
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</tbody>
</table>

### Key Organization Documents

- Letter of Determination
- 2021 Annual Report
- 2019 Annual Report
- 2018 Annual Report
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
**CALIFORNIA HUMANITIES**

Aka California Humanities

538 9th St Ste 210
Oakland, CA 94607

- **Foundation Status Code:** PC*
- **Public charity described in section 509(a)(1) or (2)**

---

**IRS Publication 78 Details**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Location</th>
<th>Most recent IRS Publication 78</th>
</tr>
</thead>
<tbody>
<tr>
<td>California Humanities</td>
<td>Oakland, CA</td>
<td>July 2023</td>
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- **EIN:** 94-2952469
- **Deductibility status description:** A public charity (50% deductibility limitation).

**IRS Business Master File Details**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Most recent IRS BMF</th>
<th>Reason for Non-Private Foundation Status</th>
</tr>
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<tbody>
<tr>
<td>CALIFORNIA HUMANITIES</td>
<td>July 10 2023</td>
<td>Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)</td>
</tr>
</tbody>
</table>

- **EIN:** 94-2952469
- **IRS subsection:** This organization is a 501(c)(3) Public Charity
- **Ruling date:** 01/1985

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

---

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

---

**GuideStar Charity Check Data Sources**

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- The IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.
- The IRS Business Master File lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.
- The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list contains organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

---

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